

**Relationship Tracker User Manual:  
V1.1**

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## **1.0 Introduction**

### **1.1 What is the Relationship Tracker?**

Put simply, the Relationship Tracker is a place to store important information relating to external organisations which Health Exchange has contact with. It is like an electronic version of a rolodex card system that might have been used in the past to store information we want to be able to keep and refer to. External organisations can be establishments which Health Exchange provides services for, including GP surgeries, partner organisations we worked with such as Macmillan, and also enterprises which Health Exchange is looking to work with in the future.

Each organisation has an individual record on the Relationship Tracker. Within each record are areas to record and store:

- Business address and contact information
- Employee contact details
- Communications with employee contacts
- Service and referral information
- File attachments

### **1.2 Why does Health Exchange need it?**

Previously Health Exchange had no single, centralised system for recording the important information we need to know about our relationships with external organisations. Different people who worked with the same organisation had their own individual records in notebooks, Word documents, spreadsheets, etc. Not everybody had the same information, some information varied from one source to another, and not everything was up to date. Put simply, we were unable to effectively share information across the organisation, and as a result sometimes we didn't know things we should have known.

As our organisation grows there will be a much greater number of organisations that we will work with in one way or another, and we will have more employees, and more services. In order to manage our external relationships effectively, we need a single place to store all information relevant to our external relationships, which is accessible and updated by everyone who needs to access it. That is what the Relationship Tracker will allow us to do.

### **1.3 What Benefits can it Yield?**

Using the Relationship Tracker offers advantages to both individual staff members and Health Exchange. The main benefits are listed below:

- Staff members will be able to recall and rely upon information stored within the Relationship Tracker for use within their daily roles. For instance, if a Health Trainer wants to find a GP surgery address they could quickly find the relevant record and have that information within seconds.
- The Relationship Tracker is accessible via the Intranet using private login and password details. This means that office and remote workers will be able to access the system providing they have an Internet connection.
- Staff members will possess greater ability to share and feed back valuable information acquired within their daily roles. If a member of our front-line teams had a particularly interesting conversation with an employee of an external organisation, they'd be able to summarise what was discussed and make it available to other Health Exchange personnel who may also need to know.
- The Relationship Tracker will enable all employees to develop, contribute to and access a single, in-depth view of each external organisation.
- The Relationship Tracker will help us to develop better informed assessments of external organisations and their objectives. In turn, this will allow us to plan how we want to develop and manage our external relationships.
- Help users to manage and develop relationships more effectively, realising the opportunities available to Health Exchange itself.

### **1.4 What's in the Relationship Tracker Manual?**

The Relationship Tracker user manual explains how to:

- Gain access to the system
- Handle the user controls
- Find your way around the Relationship Tracker interface
- Find and search for records
- Access, create and change contact and communications to organisation records
- Access and record information on additional areas including services and organisation site locations

A glossary of terms is also listed at the end of this manual.

## 2.0 How to Log on and Access the Relationship Tracker

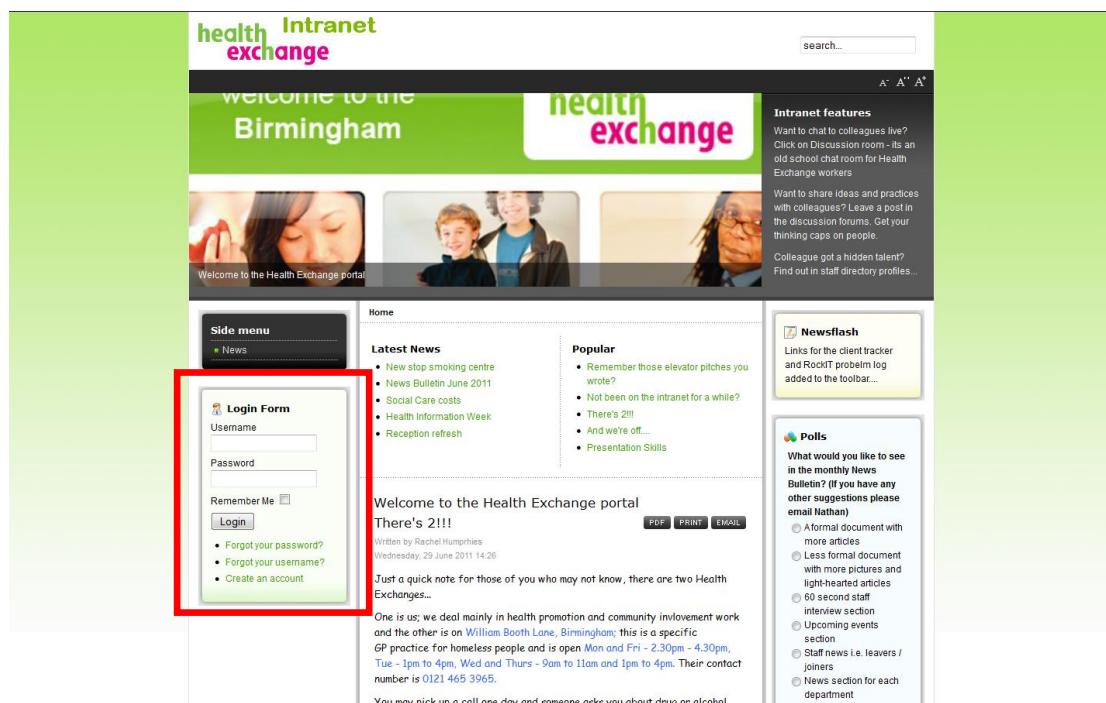
To access the Relationship Tracker, follow the step-by-step guide below.

1. The first step in accessing the Relationship Tracker is to open your web browser and enter the Health Exchange Intranet URL into the address bar found below:

<http://knowledge.healthexchange.org.uk/>

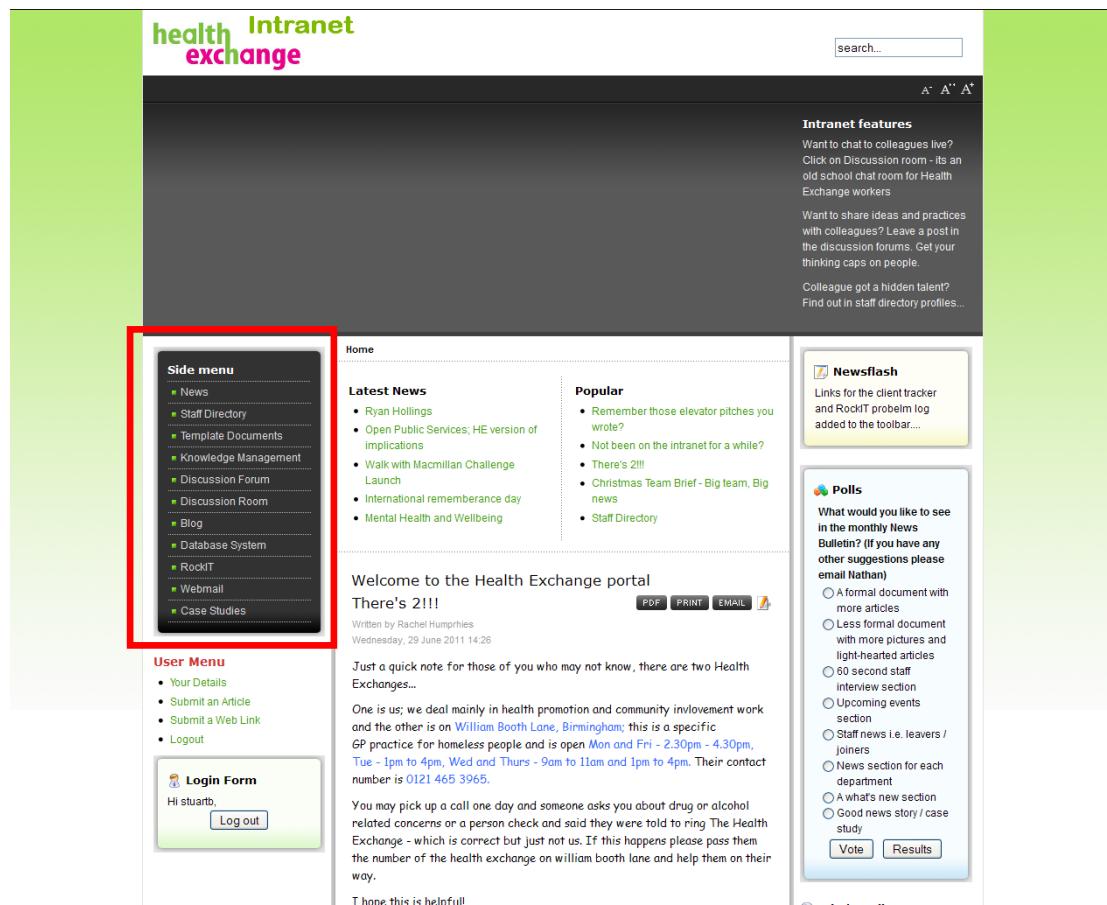


2. You will now be presented with the Health Exchange Intranet site. Enter your Intranet Username and Password in the *Login Form* area on the left hand side of the page.

A screenshot of the Health Exchange Intranet homepage. The page has a green header with the "health exchange" logo. Below the header, there are three images of people. The main content area has a "Home" section with "Latest News" and "Popular" articles. On the left, there is a "Side menu" with a "News" option and a "Login Form" box. The "Login Form" box is highlighted with a red rectangle. The "Login Form" box contains fields for "Username" and "Password", a "Remember Me" checkbox, and a "Login" button. Below the login buttons are links for "Forgot your password?", "Forgot your username?", and "Create an account". The right side of the page has sections for "Intranet features", "Newsflash", and "Polls".

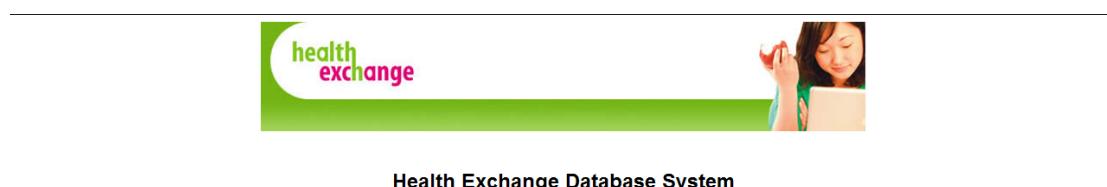
## Relationship Tracker User Manual: V1.1

3. After successfully logging into the Intranet, you will be able to access the *Side Menu* panel on the left hand side of the page. From the list, left click on *Database System*.



The screenshot shows the Health Exchange Intranet homepage. The left sidebar has a red box around the 'Side menu' section, which lists various intranet features. The main content area includes 'Latest News' and 'Popular' sections, a 'Newsflash' box, and a 'Polls' box.

4. You will now be presented with the *Health Exchange Database System* login page.



The screenshot shows the Health Exchange Database System login page. It has a logo at the top left, a photo of a woman at the top right, and a 'Login' button in the center.

5. Left click on the blue *Login* hyperlink listed above. After doing so you will be prompted to enter your assigned Username and Password details.

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6. After entering your login details, left click on the *Login* button in the centre of the page.



### Health Exchange Database System

Guest Account (not available)  
 Account Name and Password

Username:   
Password:

Unauthorised access is prohibited.

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7. The Health Exchange Database Systems page will now be accessible. From the buttons seen below, select *Relationship Tracker* to enter the database.

Main Menu  
Logged on as: admin

Help

Logout

Health Exchange Database systems

Please select the database you require

Support Plus (HE Client Database)

bWell

CDE

Walks

Quality of Life

Relationship Tracker

Inventory Tracker (Test)

Breastfeeding (Test)

Staff Activity Tracker (Test)

GP Questionnaire

Manage GP Practices

User Management

Location Management

Version 3.2 - June 2011

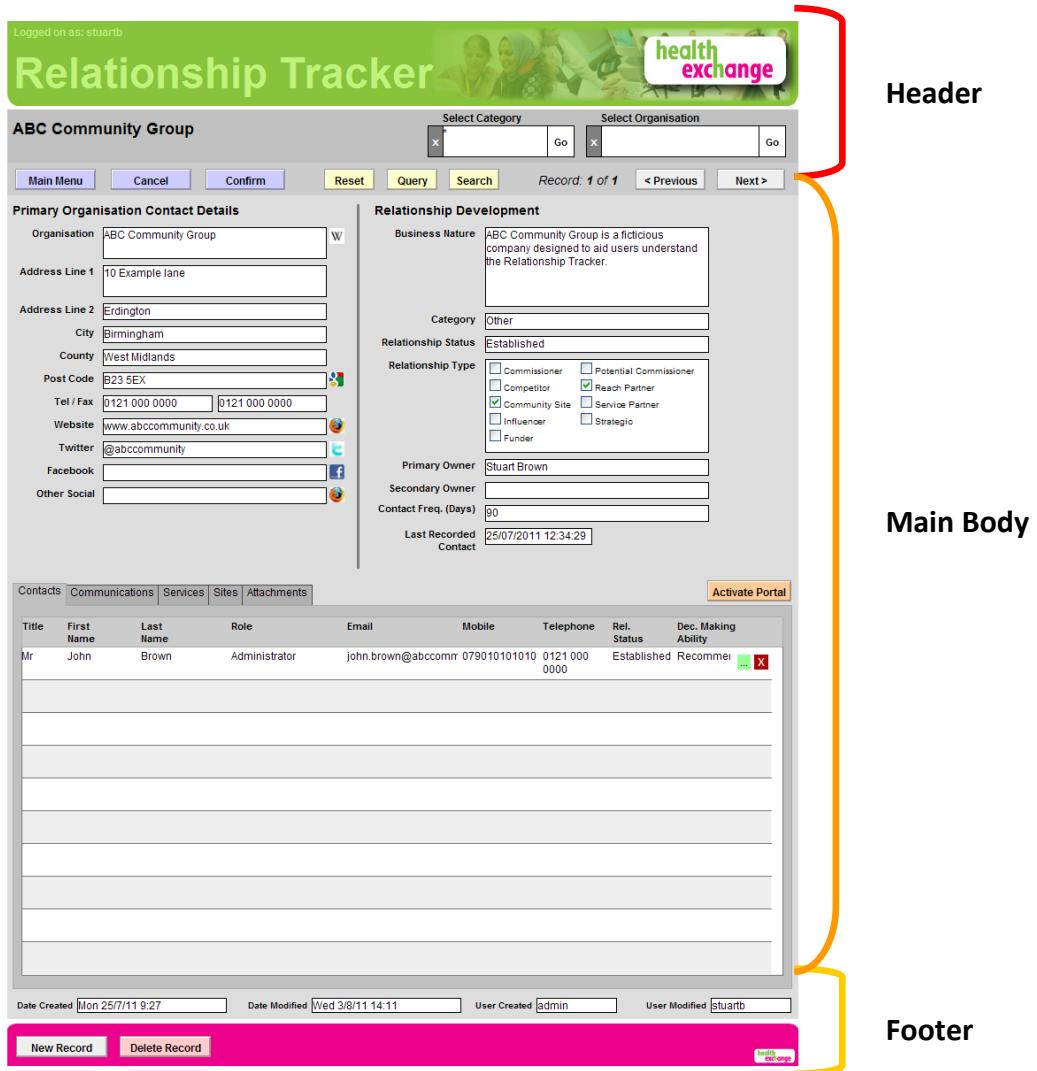
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8. You will now be presented with the Relationship Tracker's main page.

### 3.0 User Controls and Navigating around the Relationship Tracker Interface

Below is a view of the Relationship Tracker's main page view in its entirety. To help staff members understand the features within the Relationship Tracker, the Relationship Tracker's main page will be discussed in three separate sections:

- Header (*the top part of the page*)
- Main Body (*the middle section*)
- Footer (*the bottom section*)



The screenshot shows the Relationship Tracker interface. At the top is a green header bar with the title 'Relationship Tracker' and the 'health exchange' logo. Below the header is a grey navigation bar with buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and record navigation ('Record: 1 of 1', '<Previous', 'Next >'). The main body contains two vertical panels. The left panel, titled 'ABC Community Group', contains 'Primary Organisation Contact Details' with fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook, and Other Social. The right panel, titled 'Relationship Development', contains 'Business Nature' (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), 'Category' (Other), 'Relationship Status' (Established), 'Relationship Type' (checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, and Funder, with 'Community Site' checked), 'Primary Owner' (Stuart Brown), 'Secondary Owner', 'Contact Freq. (Days)' (90), and 'Last Recorded Contact' (25/07/2011 12:34:29). At the bottom are tabs for 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments', and a 'Activate Portal' button. The footer is a pink bar with buttons for 'New Record' and 'Delete Record', and the 'health exchange' logo.

**Header**

**Main Body**

**Footer**

### 3.1 The Header Section

For ease of use, record titles and user controls have been positioned at the top of the page.



Logged on as: stuartb

# Relationship Tracker

ABC Community Group

Select Category      Select Organisation

Main Menu      Cancel      Confirm      Reset      Query      Search      Record: 1 of 1      < Previous      Next >

#### Header Title

At the top of the page, one can see a header title named *Relationship Tracker*. This denotes that the user is on the Relationship Tracker database's main record page.

#### Organisation Title

Immediately below the *Relationship Tracker* header title on the left hand side, *ABC Community Group* can be seen in bold black text. This is the name of the organisation record and informs the user of the record they are currently viewing.

#### Drop-down Menus

To the right hand side are two drop-down menus used to navigate and cycle through organisation records on the Relationship Tracker.

The first drop-down menu<sup>1</sup> is titled *Select Category*. This field<sup>2</sup> allows users to filter all of the organisations by the type of category which the organisation is listed as. For example, if *Charity* is selected, only charity organisations will be available.

The second drop-down menu is titled *Select Organisation*. This drop-down menu displays the organisation records within the Relationship Tracker. One can left click on the drop-down menu, scroll up and down the list and highlight the particular organisation record they wish to view. The action is completed by pressing the *Go* button immediately right of the drop-down menu.

#### Blue Control Buttons

Below this section is an area with a light grey background. A set of blue buttons can be seen, with the first one titled *Main Menu*. Left clicking this button will bring the user to the main page of the Health Exchange Database Systems (see the previous section titled "How to log on and access the Relationship Tracker".)

The blue *Cancel* and *Confirm* buttons allow users to save or clear changes they have made to the record. For example, if a user wishes to change the telephone number

<sup>1</sup> A drop-down menu is an area which allows users to select values or categories from a prescribed list.

<sup>2</sup> Fields are sections within the database which store and display information. Some are accessible to users, whereas others are locked.

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on the main record, they would press the *Confirm* button to save the change made. However, if a user does not wish to save a change they have made, they would press the *Cancel* button to undo their amendment.

### **Yellow Find Buttons**

The yellow buttons named *Reset*, *Query* and *Search* are related to finding records within the Relationship Tracker. Their use will be explained further in [\*\*chapter 4.0\*\*](#).

### **Record Selection Text**

Right of the yellow buttons is a text line which informs the user of the record number currently being viewed, as well as the total number of records. For example, if the user was displaying record 16 and there were 90 records in total, the text would state *Record: 16 of 90*. This is useful when searching for records and is explained further in [\*\*chapter 4.0\*\*](#).

### **Next and Previous Buttons**

To the right of the record selection text are two pale grey buttons named *Previous* and *Next*. These buttons allow the user to simply navigate forwards and backwards from one record to the next.

### 3.2 The Main Body Section

The main body of the Relationship Tracker's main page is where important information is stored on the organisation record.

### **Primary Organisation Contact Details: Title**

At the top of the main body is a bold black title named *Primary Organisation Contact Details*. This denotes that the fields below are used to store contact and address information.

## Field Labels

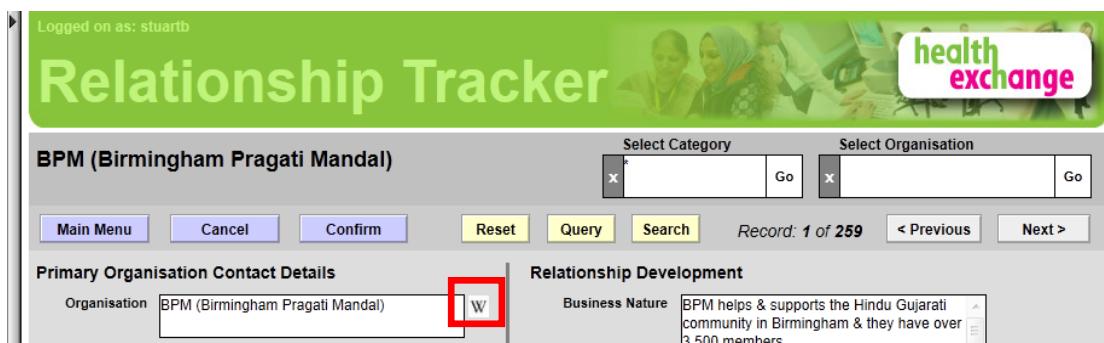
Each field within the Relationship Tracker has been issued with a label. This is to help the user understand what the field is used for and what type of information should be entered. For example, the top field on the left hand side is labelled *Organisation*. By reading this description users will be able to tell that this field is where the organisation's name is entered and stored.

### Primary Organisation Contact Details: Fields

This section displays address and contact details relating to the organisation record's main site location. Moreover, fields for storing social media information such as Twitter and Facebook web addresses.

### Activity Icons

On the right hand side of certain fields, small activity icons are visible. For example, the first field named *Organisation* has a "W" icon to the right hand side of it.



Left clicking this button will allow users to search for the organisation's Wikipedia page on the Internet<sup>3</sup>. Similarly, left clicking on the activity icon right of the *Post Code* field will bring users to a Google Maps page, displaying a map location of where the headquarters of the specific organisation is located<sup>4</sup>.

### Relationship Development

To the right of the *Primary Organisation Contact Details* section is the *Relationship Development* area<sup>5</sup>. The fields within this section are used, at a glance, to describe the type, category, and status of the relationship between the organisation and Health Exchange itself. Primary Owner and Secondary Owner are fields which denote individual staff members who are in overall command of the organisational relationship. This means that they are the ones that have high level communications with this organisation, maintain the relationship and pursue development activities.

### Tabbed Portals

Below the *Relationship Development* area one can see a section with white and grey rows. This section is called the tabbed portal and is used to display additional information related to the main record. For example, the portal area displays information relating to *Contacts*, *Communications*, *Services*, *Sites* and *Attachments*. Accessing tabbed portals will be discussed in later chapters.

<sup>3</sup> N.B. If no page has been created on Wikipedia for the organisation, no information will be displayed.

<sup>4</sup> N.B. to access such pages, the user must enable pop-up windows within their web browser for the Relationship Tracker web address.

<sup>5</sup> This area is primarily used by the Partner Relations team and the relationship owner to manage the relationship and inform users of key development factors.

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### **Portal Activation Button**

Just above the Tabbed Portal to the right hand side of the page is an orange button titled *Activate Portal*. When clicked, this button allows users to input information into the tabbed portal area. Once again, this feature will be discussed in later chapters.

### 3.3 The Footer Section

Below the main body section is the footer area at the bottom of the page<sup>6</sup>.



#### Date Created

At the left hand side of the footer section is a field named *Date Created*. This field informs the user as to when the record was created. A timestamp is used to display this information in day, date, and time format.

#### Date Modified

The next field to the right is named *Date Modified* field and informs the user when the record was last amended by an individual. Once again a timestamp is used to display this information in day, date, and time format.

#### User Created

The *User Created* field allows one to identify who within Health Exchange created the record currently being viewed. The creator's username will be displayed and hence follow Health Exchange naming conventions. For example, James Kay would be displayed as JamesK.

#### User Modified

The *User Modified* field allows one to identify the last individual within Health Exchange to amend the record being viewed.

#### New Record Button

Below the date and user fields is the *New Record* button on a cerise coloured background. The New Record button is used to create a new record for an organisation.

#### Delete Record Button<sup>7</sup>

Lastly, the *Delete Record* button is found, enabling one to remove the selected record from the database.

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<sup>6</sup> Information displayed within the footer fields is automatically generated and non-modifiable by users.

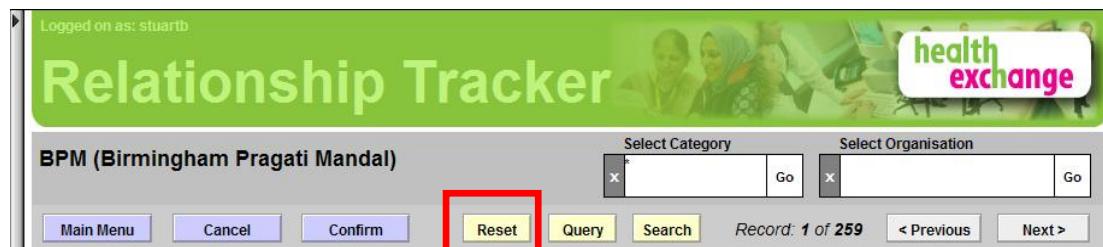
<sup>7</sup> N.B. The *Delete Record* button will only be accessible to privileged users. This is to avoid the inherent risk of deleting records accidentally and also help manage the Relationship Tracker database in a controlled manner.

## **4.0 Finding Records**

Being able to quickly find the record you wish to view is very important to the overall Relationship Tracker user experience. Recalling the record you wish to view can be performed by two primary methods which will be discussed below.

### **4.1 Searching**

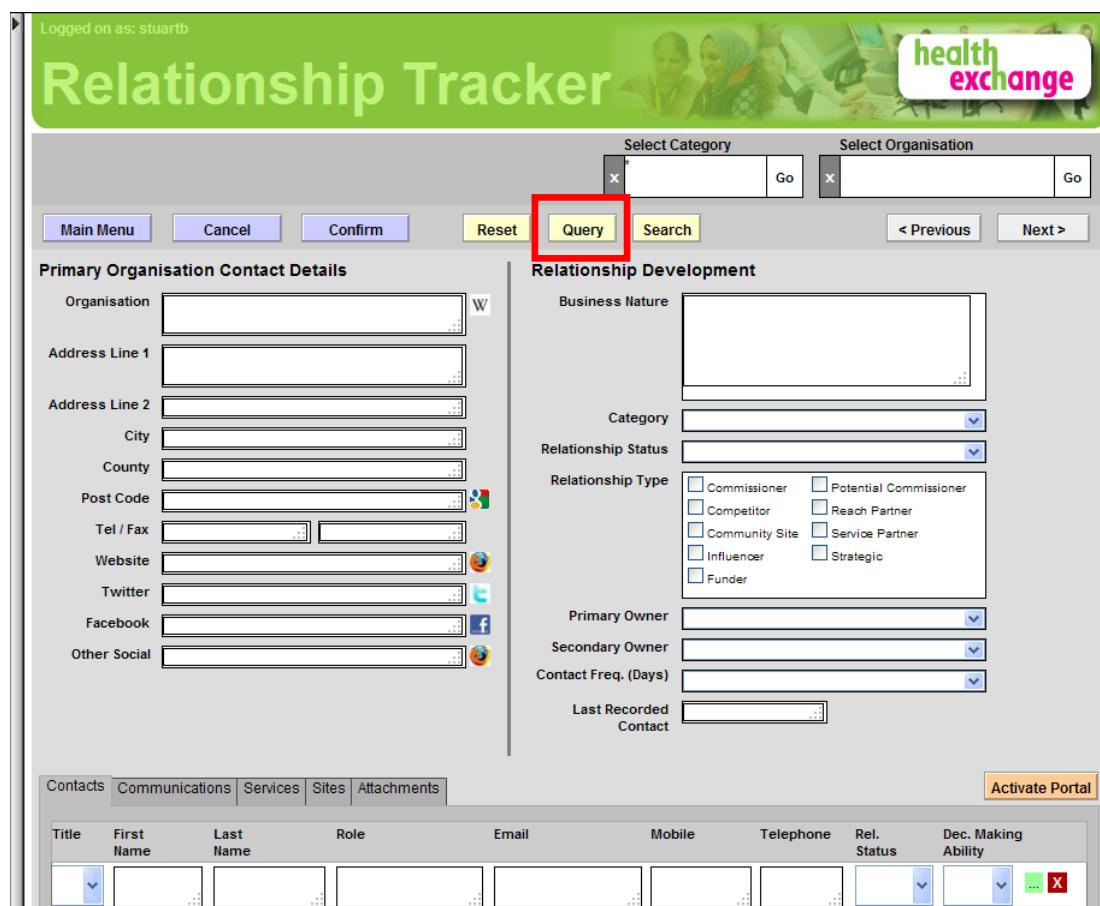
Record searches can be performed quickly within the Relationship Tracker by using the yellow buttons found in the header section.



1. To perform a search, one must first ensure that all records are selected. This can be performed by left clicking on the first yellow button the left titled *Reset*.

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2. Press the yellow *Query* button to conduct a search. Doing so will put the Relationship Tracker into *Find Mode*. Entering *Find Mode* allows users to enter search information into the Relationship Tracker's fields on the main page.



The screenshot shows the Relationship Tracker interface. At the top, there are two search fields: 'Select Category' and 'Select Organisation', each with a 'Go' button. Below these are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query' (which is highlighted with a red box), and 'Search'. To the right of these are navigation buttons: '< Previous' and 'Next >'. The main area is divided into two sections: 'Primary Organisation Contact Details' on the left and 'Relationship Development' on the right. The 'Primary Organisation Contact Details' section contains fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, Twitter, Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature, Category, Relationship Status, Relationship Type (with a list of options: Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, Strategic, Funder), Primary Owner, Secondary Owner, Contact Freq. (Days), and Last Recorded Contact. At the bottom, there are tabs for Contacts, Communications, Services, Sites, and Attachments, and an 'Activate Portal' button. A table below these tabs shows columns for Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability.

### 4.1.1 Search Example

If a user wanted to find the *Birmingham Central Library* record, one could enter the word *Birmingham* into the *Organisation* field.



This screenshot shows the Relationship Tracker interface in Find Mode. The 'Organisation' field in the 'Primary Organisation Contact Details' section contains the text 'Birmingham', which is highlighted with a red box. The 'Search' button in the top navigation bar is also highlighted with a red box. The rest of the interface is identical to the previous screenshot, including the 'Relationship Development' section and the bottom table.

Left clicking on the yellow *Search* button now performs the search.

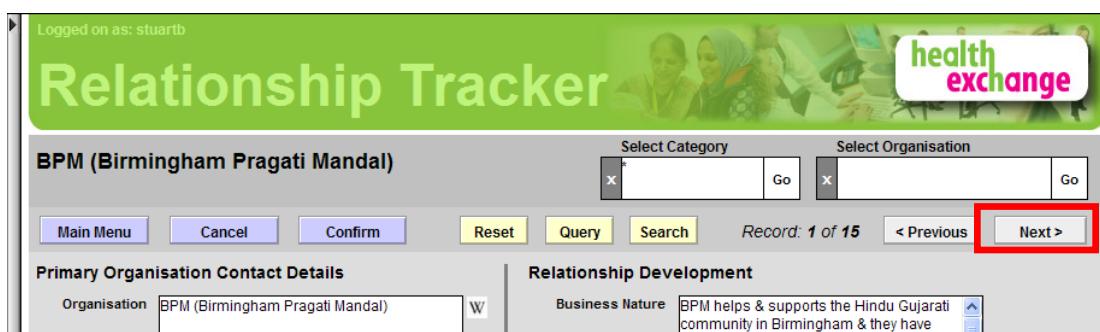
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Looking at the *Record Selection Text* field seen above tells the user that the Relationship Tracker has found 15 records with *Birmingham* in the *Organisation* field. The first record found is called *BPM (Birmingham Pragati Mandal)* and can clearly be seen to have *Birmingham* within its title.



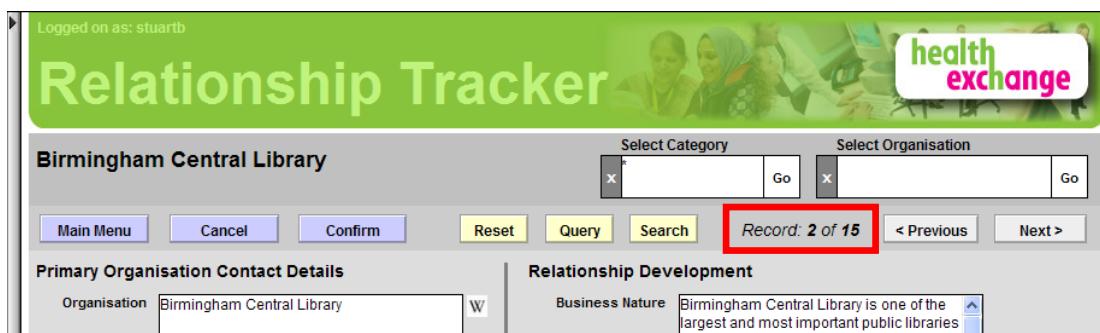
The screenshot shows the Relationship Tracker interface. The title bar says 'Relationship Tracker' and 'health exchange'. The 'Record Selection Text' field contains 'BPM (Birmingham Pragati Mandal)' and is highlighted with a red box. Below the search bar, the text 'Record: 1 of 15' is displayed, also highlighted with a red box. The interface includes buttons for Main Menu, Cancel, Confirm, Reset, Query, Search, and navigation arrows for Previous and Next.

As we wish to view the *Birmingham Central Library* record, one can use the *Next* button on the right hand side of the header section to scroll to the next record.



The screenshot shows the Relationship Tracker interface. The title bar says 'Relationship Tracker' and 'health exchange'. The 'Record Selection Text' field contains 'BPM (Birmingham Pragati Mandal)' and is highlighted with a red box. Below the search bar, the text 'Record: 1 of 15' is displayed, also highlighted with a red box. The 'Next' button in the header is highlighted with a red box. The interface includes sections for Primary Organisation Contact Details and Relationship Development, showing details for the first record found.

As we can see below, the record now being viewed is for the *Birmingham Central Library*. Users may also wish to note that the *Record Selection Text* field has changed to *Record: 2 of 15* as we are now viewing the second record found within our search.

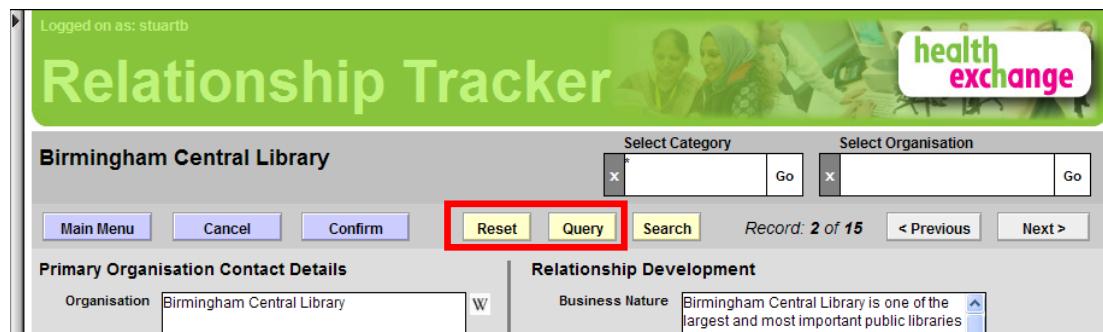


The screenshot shows the Relationship Tracker interface. The title bar says 'Relationship Tracker' and 'health exchange'. The 'Record Selection Text' field contains 'Birmingham Central Library' and is highlighted with a red box. Below the search bar, the text 'Record: 2 of 15' is displayed, also highlighted with a red box. The 'Next' button in the header is highlighted with a red box. The interface includes sections for Primary Organisation Contact Details and Relationship Development, showing details for the second record found.

### 4.1.2 Search Example 2

Searches can also be performed using drop-down menus and checkbox set lists<sup>8</sup>. Let's conduct a search where the user wishes to find *Charity* organisations where the *Relationship Type* is *Reach Partner*.

Press the *Reset* button to make sure you are accessing all the records and then left click the *Query* button.



The screenshot shows the 'Relationship Tracker' interface. At the top, there are 'Select Category' and 'Select Organisation' dropdowns. Below them are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset' (which is highlighted with a red box), 'Query' (also highlighted with a red box), 'Search', and 'Record: 2 of 15' with navigation buttons. The 'Primary Organisation Contact Details' section shows 'Organisation: Birmingham Central Library'. The 'Relationship Development' section shows 'Business Nature: Birmingham Central Library is one of the largest and most important public libraries in Europe'. The 'Query' button is highlighted with a red box.

From the *Category* field, select *Charity* from the drop-down menu bar. This can be achieved by left clicking on the chevron arrow highlighted in red below.

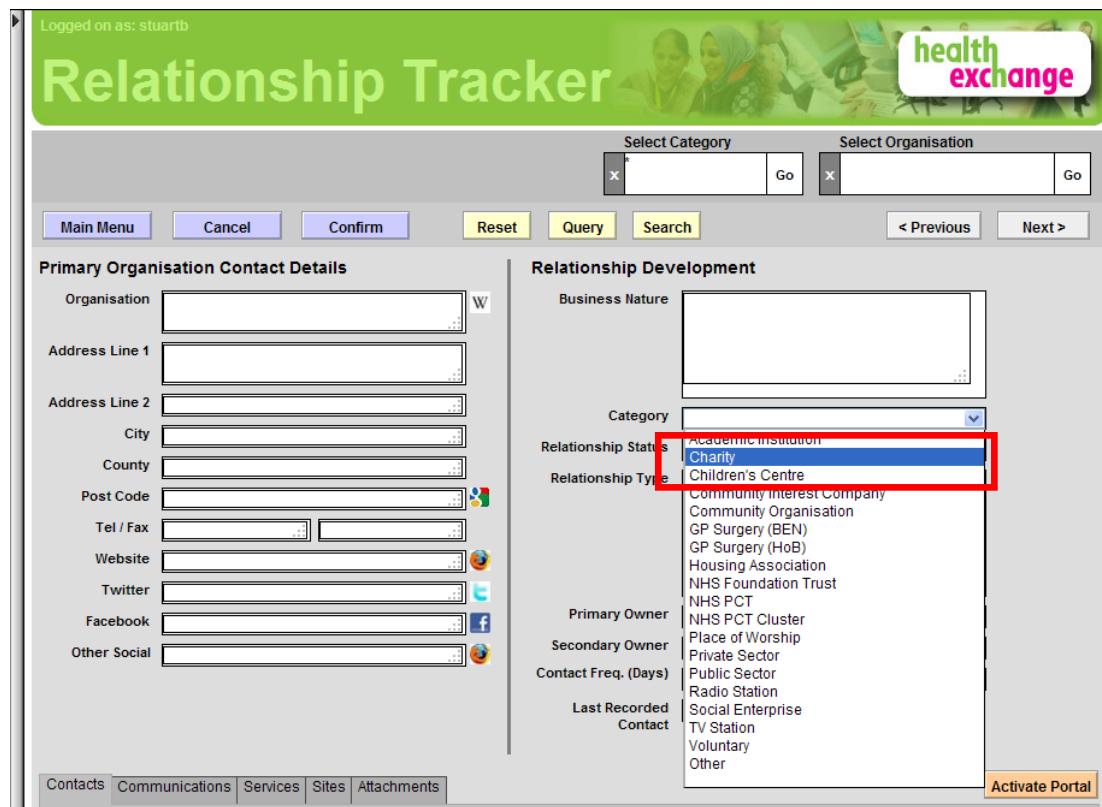


The screenshot shows the 'Relationship Tracker' interface with the 'Query' button highlighted with a red box. The 'Primary Organisation Contact Details' section includes fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, and Twitter. The 'Relationship Development' section includes fields for Business Nature, Category, Relationship Status, and Relationship Type. The 'Relationship Type' dropdown menu is open, showing a list of checkboxes: Commissioner, Potential Commissioner, Competitor, Reach Partner (which is checked and highlighted with a red box), Community Site, Service Partner, Influencer, Strategic, and Funder.

<sup>8</sup> Checkbox set lists are fields which allow the user to tick or leave blank. A ticked checkbox may indicate a certain selection. For example, ticking *Funder* checkbox set within the *Relationship Type* field would suggest that the organisation provides funding to Health Exchange.

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A list of categories will then be displayed. Highlight and left click on *Charity* to make the selection.



Logged on as: stuartb

# Relationship Tracker

Primary Organisation Contact Details

Organisation  W

Address Line 1

Address Line 2

City

County

Post Code  

Tel / Fax

Website  

Twitter  

Facebook  

Other Social  

Relationship Development

Business Nature

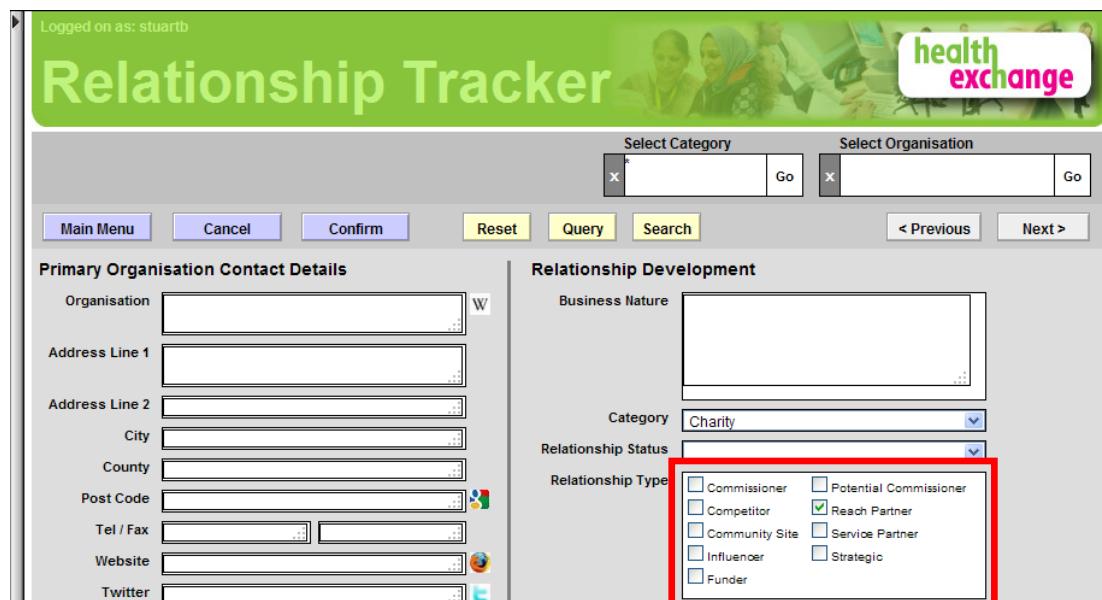
Category

Relationship Status  Academic Institution  
Charity  
Relationship Type  Children's Centre

Community Interest Company  
Community Organisation  
GP Surgery (BEN)  
GP Surgery (HoB)  
Housing Association  
NHS Foundation Trust  
NHS PCT  
NHS PCT Cluster  
Place of Worship  
Private Sector  
Public Sector  
Radio Station  
Social Enterprise  
TV Station  
Voluntary  
Other

Main Menu Cancel Confirm Reset Query Search < Previous Next > Contacts Communications Services Sites Attachments Activate Portal

Now under *Relationship Type*, left click on *Reach Partner* from the Checkbox set list.



Logged on as: stuartb

# Relationship Tracker

Primary Organisation Contact Details

Organisation  W

Address Line 1

Address Line 2

City

County

Post Code  

Tel / Fax

Website  

Twitter  

Relationship Development

Business Nature

Category  Charity

Relationship Status

Relationship Type  Commissioner  Potential Commissioner  
 Competitor  Reach Partner  
 Community Site  Service Partner  
 Influencer  Strategic  
 Funder

Main Menu Cancel Confirm Reset Query Search < Previous Next > Contacts Communications Services Sites Attachments Activate Portal

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Left click on the yellow *Search* button to execute your selection.



From the *Record Selection Text* one can see that this search has found 19 records. *Apna Ghar* is the first record on these 19 records and currently being viewed. The user can now scroll up and down the found records by using the *Previous* and *Next* buttons to access other charity organisations.

## 4.2 Filtering Records

Filtering records is another method of finding records within the Relationship Tracker. This method is significantly faster compared to searching for organisation records.

Filtering records is achieved by using the two drop-down menu fields at the top of the main page; those being *Select Category* and *Select Organisation*.



### 4.2.1 Filtering by Organisation

Users can perform a simple organisation filter by using the *Select Organisation* drop-down menu field only.

Left clicking on the white area of the *Select Organisation* field will activate the drop-down menu feature.

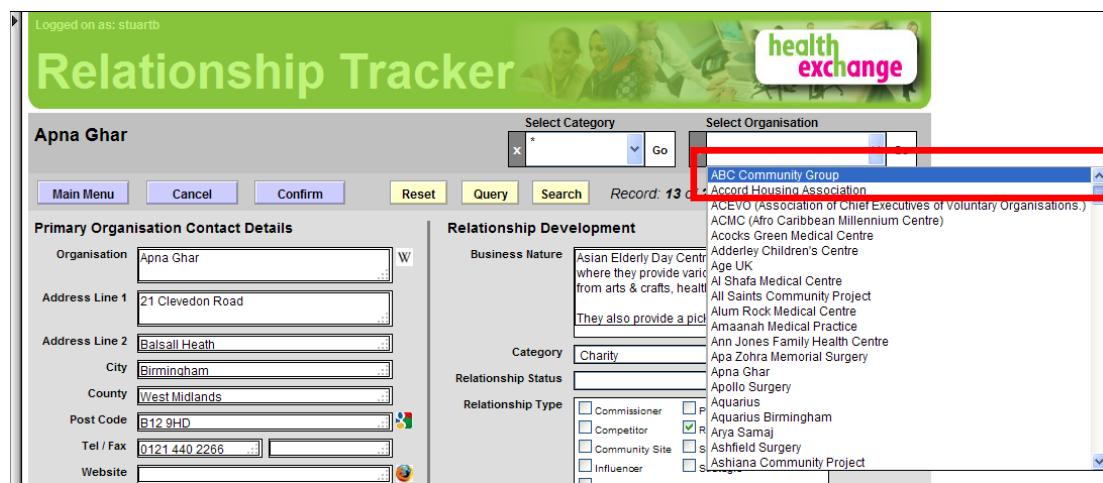


## Relationship Tracker User Manual: V1.1

Left clicking on the drop-down menu chevron arrow allows the user to see all the organisation records currently within the Relationship Tracker.



The organisation records are sorted alphabetically from A to Z. At the top of the drop-down menu we can see *ABC Community Group*. If we wished to view the *ABC Community Group* record, the user must highlight the record with the mouse cursor and left click on *ABC Community Group*.

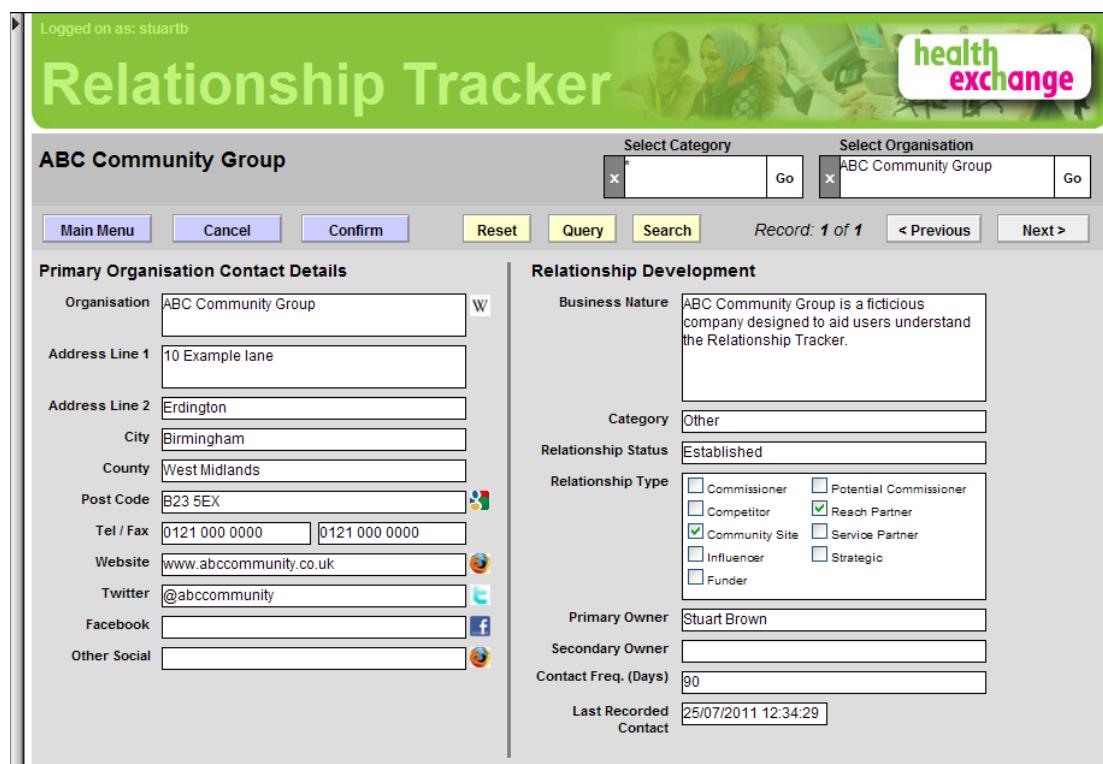


Left clicking on the *Go* button to the right hand side will then allow the user to view the *ABC Community Group* record.



## Relationship Tracker User Manual: V1.1

The *ABC Community Group* record will now be visible to the user. Users may wish to note that the Record Selection Text has changed to *Record: 1 of 1*.



Logged on as: stuartb

# Relationship Tracker

**ABC Community Group**

Primary Organisation Contact Details

Organisation	ABC Community Group
Address Line 1	10 Example lane
Address Line 2	Erdington
City	Birmingham
County	West Midlands
Post Code	B23 5EX
Tel / Fax	0121 000 0000
Website	<a href="http://www.abccommunity.co.uk">www.abccommunity.co.uk</a>
Twitter	@abccommunity
Facebook	
Other Social	

Relationship Development

Business Nature	ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.
Category	Other
Relationship Status	Established
Relationship Type	<input type="checkbox"/> Commissioner <input type="checkbox"/> Potential Commissioner <input type="checkbox"/> Competitor <input checked="" type="checkbox"/> Reach Partner <input checked="" type="checkbox"/> Community Site <input type="checkbox"/> Service Partner <input type="checkbox"/> Influencer <input type="checkbox"/> Strategic <input type="checkbox"/> Funder
Primary Owner	Stuart Brown
Secondary Owner	
Contact Freq. (Days)	90
Last Recorded Contact	25/07/2011 12:34:29

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

When the user finishes with the record they can regain access to all of the records within the Relationship Tracker by simply pressing the X button right of the *Select Organisation* drop-down menu field.



Logged on as: stuartb

# Relationship Tracker

**ABC Community Group**

Select Category

Select Organisation

ABC Community Group

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

This X button clears the record filter and allows users to access all of the records once more.



Logged on as: stuartb

# Relationship Tracker

**BPM (Birmingham Pragati Mandal)**

Select Category

Select Organisation

Main Menu Cancel Confirm Reset Query Search Record: 1 of 259 < Previous Next >

As seen above, all the records are now on show with the Record Selection Text changing to *Record: 1 of 259*.

### 4.2.2 Filtering by Category and Organisation

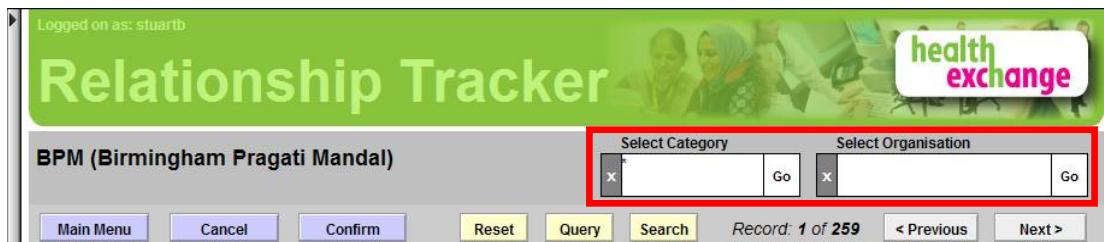
Some users may wish to filter organisations by category when attempting to find a record. The benefit of using the category filter is that it can reduce the number of records a user has to scroll and search through.

Before filtering the records by category, one must first ensure that all records are selected. Left clicking on the *Reset* button ensures all records are available.



The screenshot shows the Relationship Tracker interface. At the top, it says 'Logged on as: stuartb'. The main title is 'Relationship Tracker' with a 'health exchange' logo. Below the title, it says 'BPM (Birmingham Pragati Mandal)'. There are two dropdown menus: 'Select Category' and 'Select Organisation', both with an 'x' button and a 'Go' button. Below these are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset' (which is highlighted with a red box), 'Query', 'Search', and navigation buttons 'Record: 1 of 259', '< Previous', and 'Next >'. The status bar at the bottom shows 'Main Menu'.

N.B. Checking that all drop-down menu filters are clear is also important. If there's any text in the fields highlighted in red below, the user can simply left click on the corresponding X button to clear it<sup>9</sup>.



The screenshot shows the Relationship Tracker interface. At the top, it says 'Logged on as: stuartb'. The main title is 'Relationship Tracker' with a 'health exchange' logo. Below the title, it says 'BPM (Birmingham Pragati Mandal)'. The 'Select Category' dropdown menu is highlighted with a red box. Below it are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and navigation buttons 'Record: 1 of 259', '< Previous', and 'Next >'. The status bar at the bottom shows 'Main Menu'.

To filter records by category, the user must left click on the *Select Category* drop-down menu field.



The screenshot shows the Relationship Tracker interface. At the top, it says 'Logged on as: stuartb'. The main title is 'Relationship Tracker' with a 'health exchange' logo. Below the title, it says 'BPM (Birmingham Pragati Mandal)'. The 'Select Category' dropdown menu is open and highlighted with a red box. Below it are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and navigation buttons 'Record: 1 of 259', '< Previous', and 'Next >'. The status bar at the bottom shows 'Main Menu'.

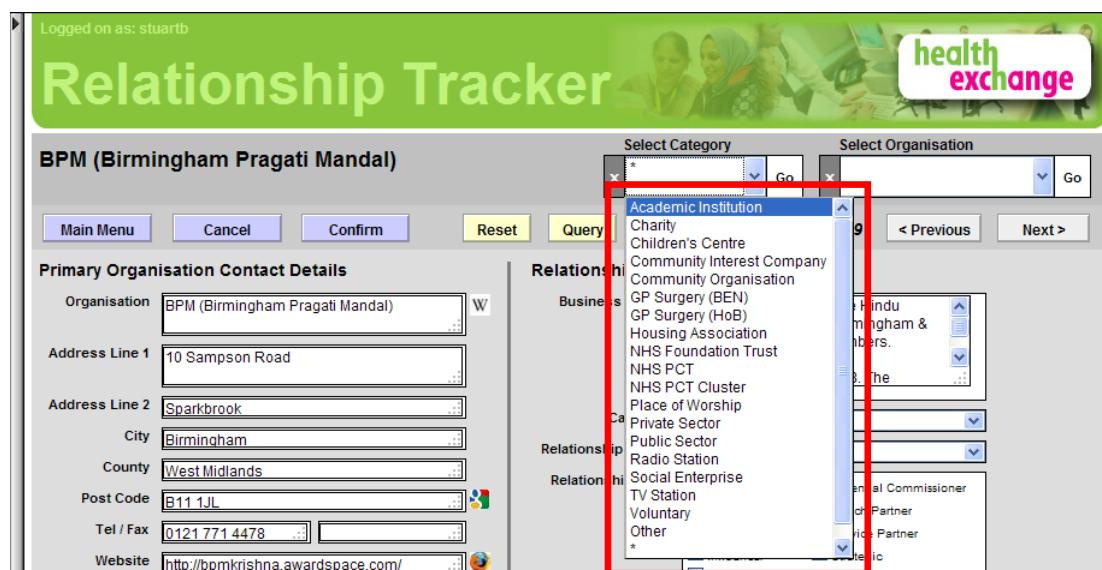
<sup>9</sup> Users may notice an asterisk (\*) symbol in the *Select Category* field. This is perfectly normal and necessary to the functionality of the category filter.

## Relationship Tracker User Manual: V1.1

This will activate the drop-down menu and allow users to gain access to the categories. Users can now left click on the drop-down menu chevron arrow to perform this function.



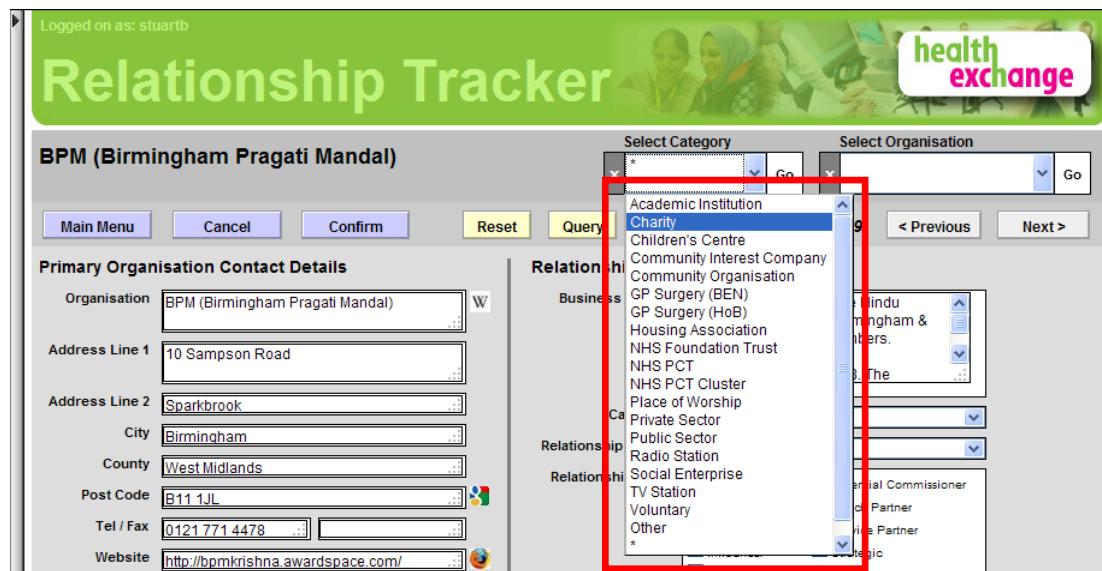
After doing so the categories will be presented for selection as seen below.



### 4.2.3 Category Filter Example

As an example of how to use the category filter, imagine if we wanted to view the record for Macmillan. We know that Macmillan is under the category of *Charity*.

With the *Select Category* drop-down menu field open, the user must highlight *Charity* with their mouse cursor and then left click on it to select it.



The screenshot shows the 'Relationship Tracker' application interface. On the left, there is a form for 'BPM (Birmingham Pragati Mandal)' with fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, and Website. On the right, there are two dropdown menus: 'Select Category' and 'Select Organisation'. The 'Select Category' dropdown is open, showing a list of categories including 'Charity', which is highlighted with a red box. The 'Select Organisation' dropdown is also open, showing a list of organisations. At the bottom, there are buttons for Main Menu, Cancel, Confirm, Reset, Query, and Go.

Pressing the *Go* button will then confirm the category selection.



The screenshot shows the 'Relationship Tracker' application interface. The 'Select Category' dropdown is open, showing 'Charity' selected and highlighted with a red box. The 'Select Organisation' dropdown is also open. At the bottom, there are buttons for Main Menu, Cancel, Confirm, Reset, Query, Search, and Go. The status bar at the bottom indicates 'Record: 1 of 259'.

As seen from below, the Record Selection Text is displaying *Record: 1 of 34*. This means that there's 34 organisation records categorised by *Charity* and the user is viewing the first record.



The screenshot shows the 'Relationship Tracker' application interface. The 'Select Category' dropdown is open, showing 'Charity' selected and highlighted with a red box. The status bar at the bottom indicates 'Record: 1 of 34'. Other buttons at the bottom include Main Menu, Cancel, Confirm, Reset, Query, Search, and Next >.

## Relationship Tracker User Manual: V1.1

Now that the records have been filtered by the *Charity* category, we can now turn our attention to the organisation records. The first step is to left click within the *Select Organisation* drop-down menu field.



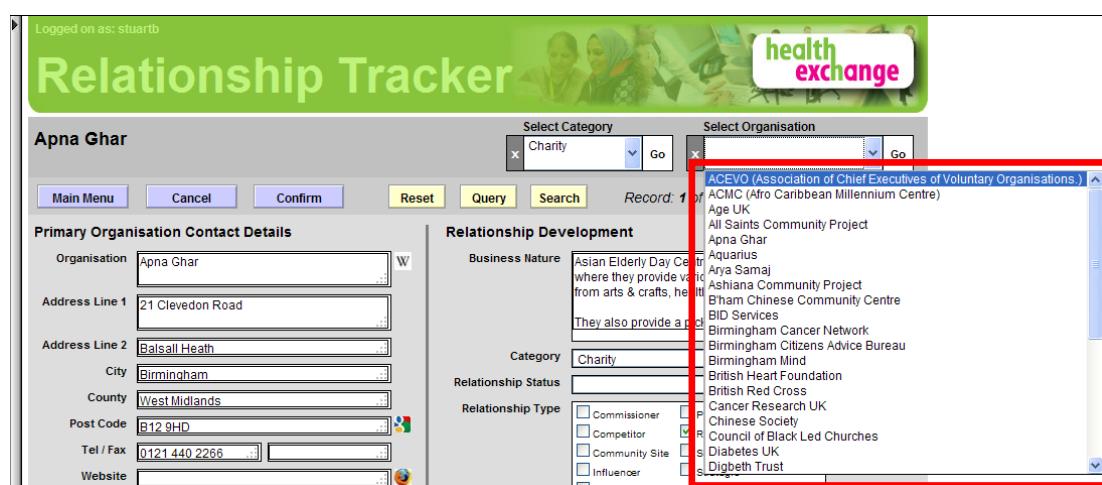
The screenshot shows the 'Relationship Tracker' application interface. At the top, there is a banner with the text 'Logged on as: stuartb' and the 'health exchange' logo. Below the banner, the title 'Relationship Tracker' is displayed. The main area contains a form with the following fields: 'Select Category' (with 'Charity' selected and a 'Go' button), 'Select Organisation' (with a dropdown menu open, showing a list of organisations, and this field is highlighted with a red box), 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', 'Record: 1 of 34', and navigation buttons '< Previous' and 'Next >'. The 'Select Organisation' dropdown menu lists various organisations, including 'ACEVO (Association of Chief Executives of Voluntary Organisations.)', 'ACMC (Afro Caribbean Millennium Centre)', 'Age UK', 'All Saints Community Project', 'Apna Ghar', 'Aquarius', 'Arya Samaj', 'Ashiana Community Project', 'B'ham Chinese Community Centre', 'BID Services', 'Birmingham Cancer Network', 'Birmingham Citizens Advice Bureau', 'Birmingham Mind', 'British Heart Foundation', 'British Red Cross', 'Cancer Research UK', 'Chinese Society', 'Council of Black Led Churches', 'Diabetes UK', 'Digbeth Trust', and 'Dignity'. The dropdown menu is also highlighted with a red box.

Doing so will activate the field. Left clicking on the drop-down menu chevron arrow will then allow the user to display the organisation records under *Charity*.



The screenshot shows the 'Relationship Tracker' application interface. The 'Select Organisation' dropdown menu is now closed, and its chevron arrow is highlighted with a red box. The rest of the interface elements are the same as the previous screenshot.

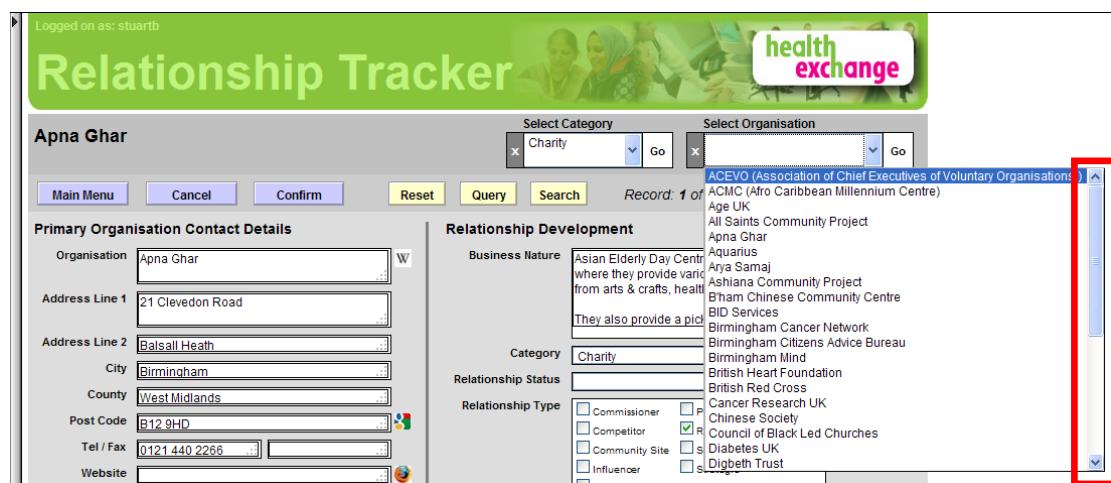
As seen below, organisation records categorised by *Charity* are now presented within the drop-down menu.



The screenshot shows the 'Relationship Tracker' application interface. The 'Select Organisation' dropdown menu is now open, displaying a list of organisations categorized under 'Charity'. The list includes: ACEVO (Association of Chief Executives of Voluntary Organisations.), ACMC (Afro Caribbean Millennium Centre), Age UK, All Saints Community Project, Apna Ghar, Aquarius, Arya Samaj, Ashiana Community Project, B'ham Chinese Community Centre, BID Services, Birmingham Cancer Network, Birmingham Citizens Advice Bureau, Birmingham Mind, British Heart Foundation, British Red Cross, Cancer Research UK, Chinese Society, Council of Black Led Churches, Diabetes UK, Digbeth Trust, and Dignity. The dropdown menu is highlighted with a red box.

## Relationship Tracker User Manual: V1.1

In this example, we wish to access the Macmillan record. All of the records within the drop-down menu are listed in alphabetical order from A to Z. Users can control the scroll bar to navigate down the drop-down menu list and find Macmillan.



Logged on as: stuart

# Relationship Tracker

Apna Ghar

Primary Organisation Contact Details

Main Menu Cancel Confirm Reset Query Search Record: 1 of 34

Relationship Development

Business Nature: Asian Elderly Day Centres where they provide various services from arts & crafts, health

Category: Charity

Relationship Status: Charity

Relationship Type:  Commissioner  Competitor  Community Site  Influencer  Other

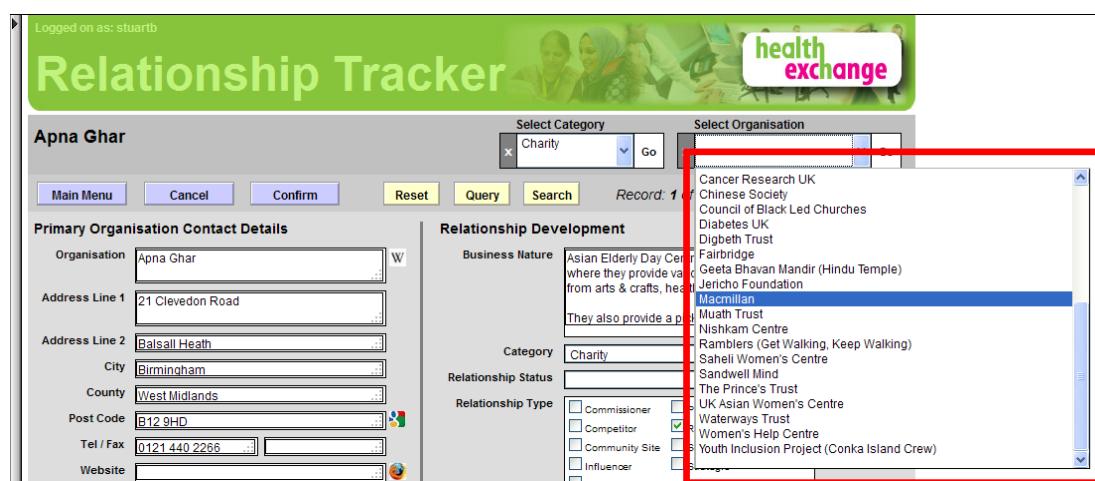
Select Category: Charity Go

Select Organisation:  Go

ACEVO (Association of Chief Executives of Voluntary Organisations)

ACMC (Afro Caribbean Millennium Centre)  
Age UK  
All Saints Community Project  
Apna Ghar  
Aquarius  
Arya Samaj  
Ashiana Community Project  
Bham Chinese Community Centre  
BID Services  
Birmingham Cancer Network  
Birmingham Citizens Advice Bureau  
Birmingham Mind  
British Heart Foundation  
British Red Cross  
Cancer Research UK  
Chinese Society  
Council of Black Led Churches  
Diabetes UK  
Digbeth Trust  
Fairbridge  
Gesta Bhavan Mandir (Hindu Temple)  
Jericho Foundation  
Macmillan  
Muath Trust  
Nishkam Centre  
Ramblers (Get Walking, Keep Walking)  
Saheli Women's Centre  
Sandwell Mind  
The Prince's Trust  
UK Asian Women's Centre  
Waterways Trust  
Women's Help Centre  
Youth Inclusion Project (Conka Island Crew)

The user will need to scroll down the drop-down list menu until they reach records beginning with *M*.



Logged on as: stuart

# Relationship Tracker

Apna Ghar

Primary Organisation Contact Details

Main Menu Cancel Confirm Reset Query Search Record: 1 of 34

Relationship Development

Business Nature: Asian Elderly Day Centres where they provide various services from arts & crafts, health

Category: Charity

Relationship Status: Charity

Relationship Type:  Commissioner  Competitor  Community Site  Influencer  Other

Select Category: Charity Go

Select Organisation:  Go

Macmillan

Cancer Research UK  
Chinese Society  
Council of Black Led Churches  
Diabetes UK  
Digbeth Trust  
Fairbridge  
Gesta Bhavan Mandir (Hindu Temple)  
Jericho Foundation  
Macmillan  
Muath Trust  
Nishkam Centre  
Ramblers (Get Walking, Keep Walking)  
Saheli Women's Centre  
Sandwell Mind  
The Prince's Trust  
UK Asian Women's Centre  
Waterways Trust  
Women's Help Centre  
Youth Inclusion Project (Conka Island Crew)

Highlighting *Macmillan* with the mouse cursor and then left clicking will select the organisation record.



Logged on as: stuart

# Relationship Tracker

Apna Ghar

Main Menu Cancel Confirm Reset Query Search Record: 1 of 34 < Previous Next >

Select Category: Charity Go

Select Organisation: Macmillan Go

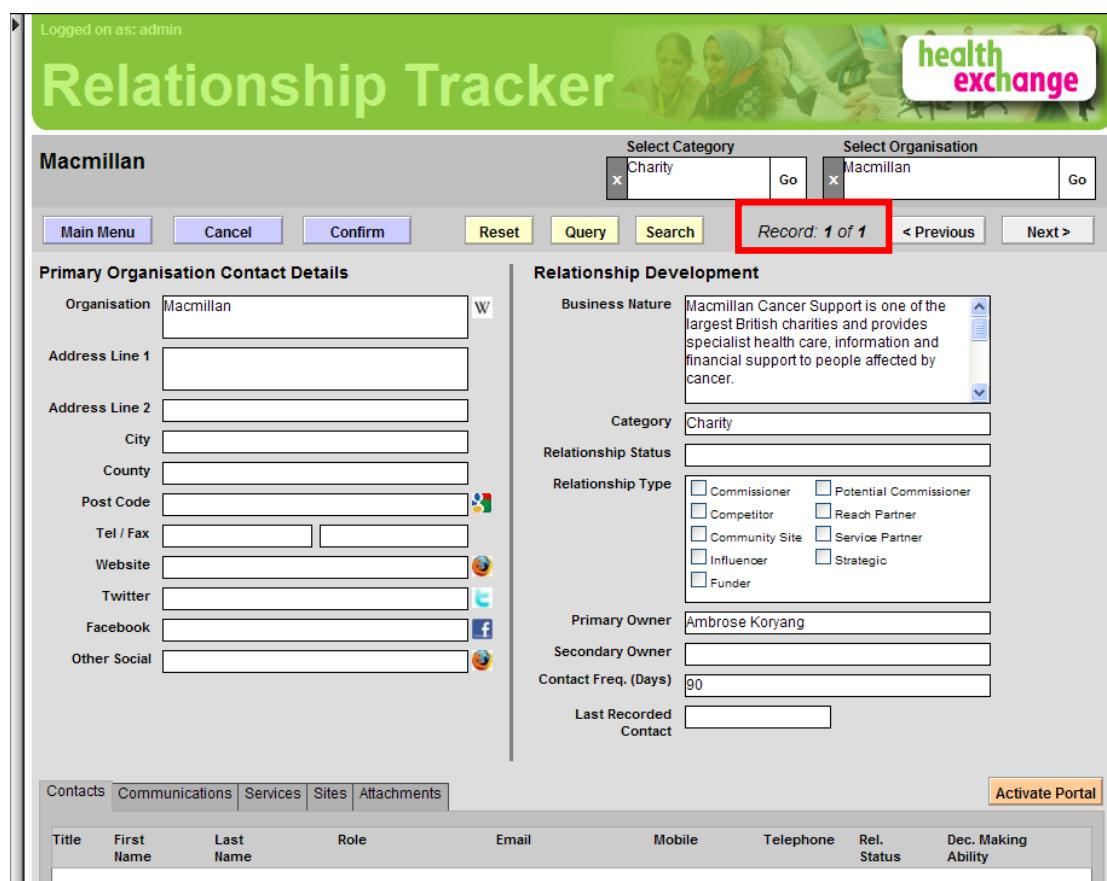
## Relationship Tracker User Manual: V1.1

Pressing the *Go* button to the right of the *Select Organisation* drop-down menu field will then recall the record to the main page.



The screenshot shows the Relationship Tracker main page. At the top, there is a banner with the text "Logged on as: stuartb" and the "health exchange" logo. Below the banner, the title "Relationship Tracker" is displayed. The search interface consists of two dropdown menus: "Select Category" (set to "Charity") and "Select Organisation" (set to "Macmillan"). To the right of each dropdown is a "Go" button. Below the dropdowns are several buttons: "Main Menu", "Cancel", "Confirm", "Reset", "Query", "Search", and "Record: 1 of 34". Navigation buttons for "Previous" and "Next" are also present.

As seen below, the Macmillan record will now be presented. Users may wish to note the Record Selection Text stating *Record 1 of 1*. This means that one record is selected out of all of the organisation records.



The screenshot shows the Relationship Tracker detail page for the organization "Macmillan". The top banner displays "Logged on as: admin" and the "health exchange" logo. The main content area is divided into two sections: "Primary Organisation Contact Details" on the left and "Relationship Development" on the right. The "Primary Organisation Contact Details" section contains fields for Organisation (Macmillan), Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, Twitter, Facebook, and Other Social. The "Relationship Development" section contains fields for Business Nature (described as a charity providing support to cancer patients), Category (Charity), Relationship Status, Relationship Type (with checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, and Funder), Primary Owner (Ambrose Konyang), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact. At the bottom, there are tabs for "Contacts", "Communications", "Services", "Sites", and "Attachments", along with an "Activate Portal" button. Below these tabs is a table with columns: Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability.

To be able to select all of the records again, left click on the *Reset* button.



The screenshot shows the Relationship Tracker search results page for the organization "Macmillan". The top banner displays "Logged on as: admin" and the "health exchange" logo. The search interface is identical to the main page, with "Select Category" (Charity) and "Select Organisation" (Macmillan) dropdowns and "Go" buttons. Below the dropdowns are buttons: "Main Menu", "Cancel", "Confirm", "Reset" (which is highlighted with a red box), "Query", "Search", and "Record: 1 of 1 found". Navigation buttons for "Previous" and "Next" are also present.

## 5.0 Accessing and Creating Contacts

Accessing the information stored within records on the Relationship Tracker is another key skill. In this chapter we will be discussing how to first access and then create contacts for organisation records.

Logged on as: admin

# Relationship Tracker

ABC Community Group

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

**Primary Organisation Contact Details**

Organisation	ABC Community Group	
Address Line 1	10 Example lane	
Address Line 2	Erdington	
City	Birmingham	
County	West Midlands	
Post Code	B23 5EX	
Tel / Fax	0121 000 0000	0121 000 0000
Website	www.abccommunity.co.uk	
Twitter	@abccommunity	
Facebook		
Other Social		

**Relationship Development**

Business Nature	ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.
Category	Other
Relationship Status	Established
Relationship Type	<input type="checkbox"/> Commissioner <input type="checkbox"/> Potential Commissioner <input type="checkbox"/> Competitor <input checked="" type="checkbox"/> Reach Partner <input checked="" type="checkbox"/> Community Site <input type="checkbox"/> Service Partner <input type="checkbox"/> Influencer <input type="checkbox"/> Strategic <input type="checkbox"/> Funder
Primary Owner	Stuart Brown
Secondary Owner	
Contact Freq. (Days)	90
Last Recorded Contact	25/07/2011 12:34:29

Activate Portal

**Contacts** **Communications** **Services** **Sites** **Attachments**

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommen

The screenshot found above is of a record called *ABC Community Group*. In the record's main body we can see the tabbed portal area with the *Contacts* tab selected. This section provides basic details, such as name, role and email address, of staff members employed by the organisation.

## Relationship Tracker User Manual: V1.1

In this case, one contact is currently being stored within this record. The user can clearly see that the individual's name is *Mr John Brown*, his role is listed as *Administrator* and contact telephone number is *0121 000 0000*.



Contact Details									Activate Portal
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability	Action
Mr	John	Brown	Administrator	john.brown@abccomr	079010101010	0121 000 0000	Established	Recommender	 

One can also see that Mr John Brown's *Relationship Status* is listed as *Established* and his *Decision Making Ability* at the *Recommender* level. These fields will be discussed in more detail shortly.

Within the same row as Mr John Smith's contact information we can see two buttons on the right hand side.



Contact Details									Activate Portal
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability	Action
Mr	John	Brown	Administrator	john.brown@abccomr	079010101010	0121 000 0000	Established	Recommender	 

### Green button

The green button displays the contact information in an in-depth view with more fields for individuals to record important information on the contact.

### Red button

If the user possesses necessary access privileges, the red button will delete the contact from the organisation. When deleted, contacts cannot be recovered.

## 5.1 Accessing the Contact's in-depth View

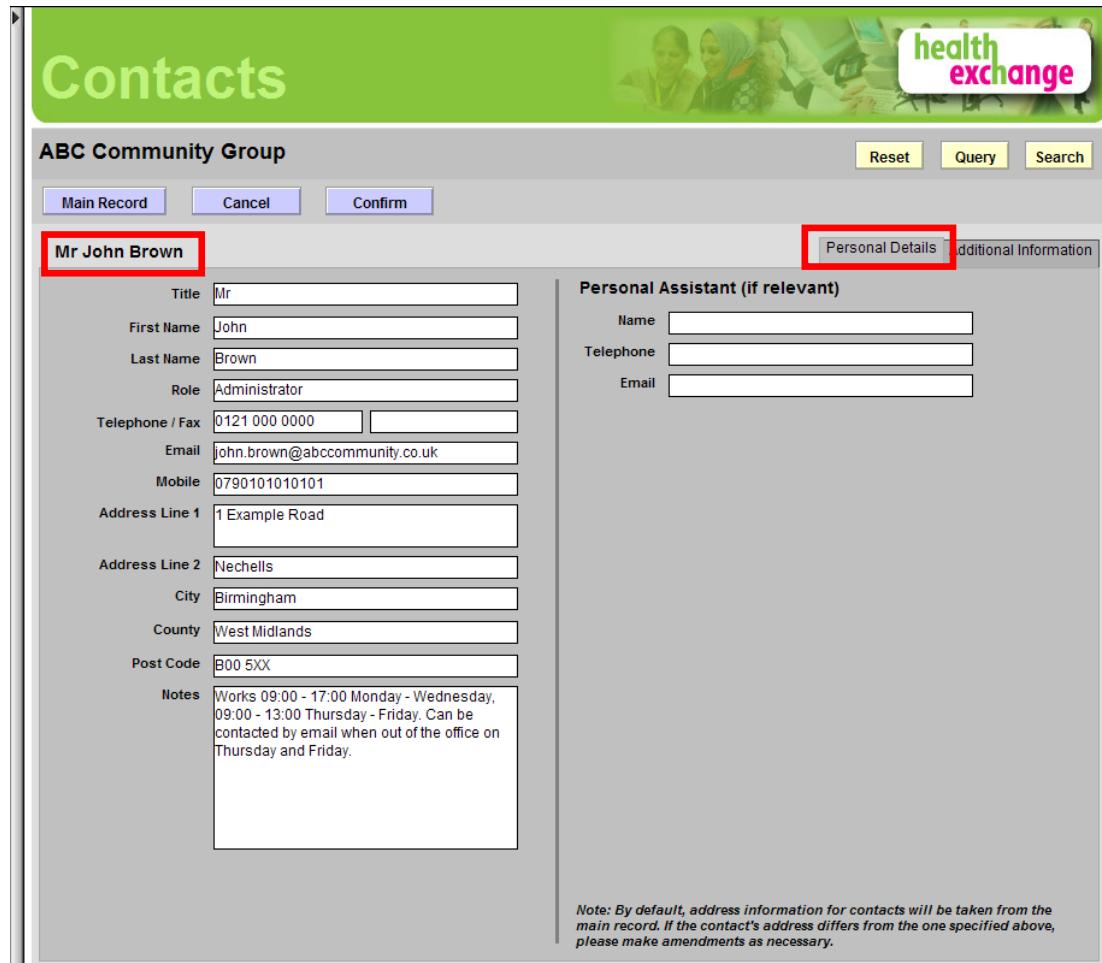
We will now enter the in-depth view by left clicking on the green button situated on the first contact row. The primary benefit of the in-depth view is that users have more space to read and record information relating to the contact.



Contact Details									Activate Portal
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability	Action
Mr	John	Brown	Administrator	john.brown@abccomr	079010101010	0121 000 0000	Established	Recommender	 

## Relationship Tracker User Manual: V1.1

As seen below, this has opened a new view and layout of the contact record *Mr John Brown*.



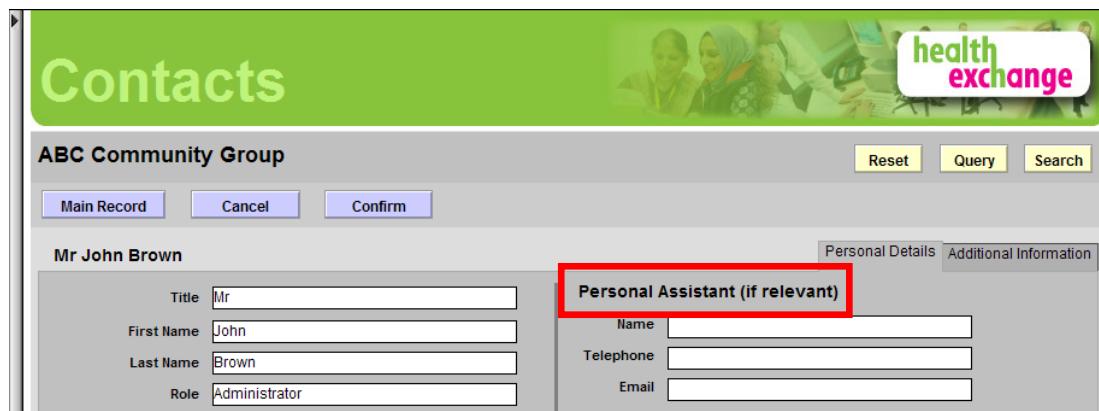
The screenshot shows a software interface for managing contacts. At the top, there is a green header bar with the word 'Contacts' in white. To the right of the header is a logo for 'health exchange' featuring a group of people. Below the header, there is a toolbar with buttons for 'Main Record', 'Cancel', 'Confirm', 'Reset', 'Query', and 'Search'. The main content area is titled 'ABC Community Group'. A contact record for 'Mr John Brown' is displayed, with the name highlighted by a red box. To the right of the contact details, there is a section titled 'Personal Assistant (if relevant)' with fields for 'Name', 'Telephone', and 'Email', also highlighted by a red box. Below the contact details, there is a 'Notes' section containing a note about working hours. At the bottom of the screen, there is a note: 'Note: By default, address information for contacts will be taken from the main record. If the contact's address differs from the one specified above, please make amendments as necessary.'

The main page is named *Personal Details* (highlighted above). From the above screenshot, one can see additional fields for a fax number, address lines, and a section for recording notes.

N.B. By default, address information for contacts is automatically sourced from the main record's address details. However users are able to change the contact's address if it differs from the main record's address.

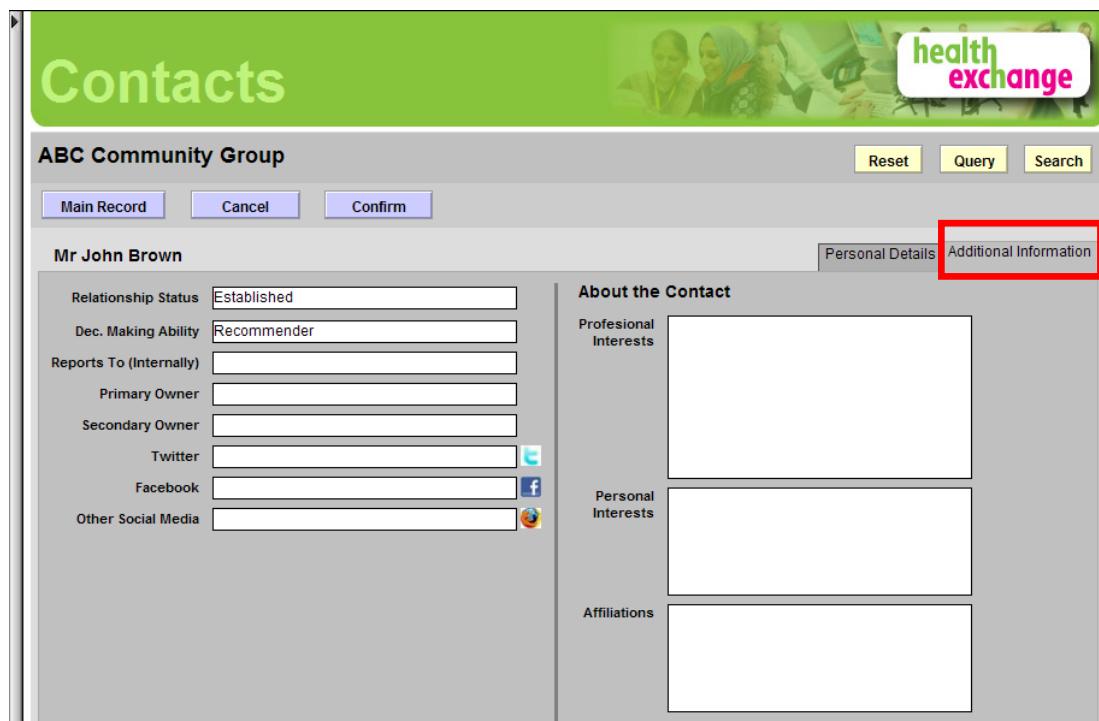
## Relationship Tracker User Manual: V1.1

On the right hand side of the page, we can also see a header named *Personal Assistant (if relevant)*. This section is for recording basic details on the contact's Personal Assistant, if necessary.



The screenshot shows a contact record for 'Mr John Brown' in the 'ABC Community Group'. The 'Personal Assistant (if relevant)' tab is highlighted with a red box. The contact details on the left include Title (Mr), First Name (John), Last Name (Brown), and Role (Administrator). The right side shows fields for Name, Telephone, and Email under the 'Personal Details' tab, with the 'Additional Information' tab also visible.

Left clicking on the next tab named *Additional Information* provides further fields which users can record information on the contact. These are discussed in detail below:



The screenshot shows the 'Additional Information' tab for 'Mr John Brown'. On the left, there are fields for Relationship Status (Established), Dec. Making Ability (Recommender), Reports To (Internally), Primary Owner, Secondary Owner, Twitter, Facebook, and Other Social Media. On the right, there is a section titled 'About the Contact' with three expandable panels: 'Professional Interests', 'Personal Interests', and 'Affiliations', each represented by a large empty text area. The 'Additional Information' tab is highlighted with a red box.

### Relationship Status

This field describes the strength and quality of the relationship which Health Exchange has with the individual contact. An *Established* contact means that the relationship is strong and on-going, whereas relationships defined as *Moribund* are of poor quality and largely inactive.

## Relationship Tracker User Manual: V1.1

### Decision Making Ability

The Decision Making Ability field assesses how much power the contact has within their organisation to make decisions. An *Approver* can make important strategic decisions, whereas an *Influencer* has an impact on the overall decision process.

### Reports To (Internally)

This field is for detailing who the contact reports to within their own organisation.

### Primary and Secondary Owner

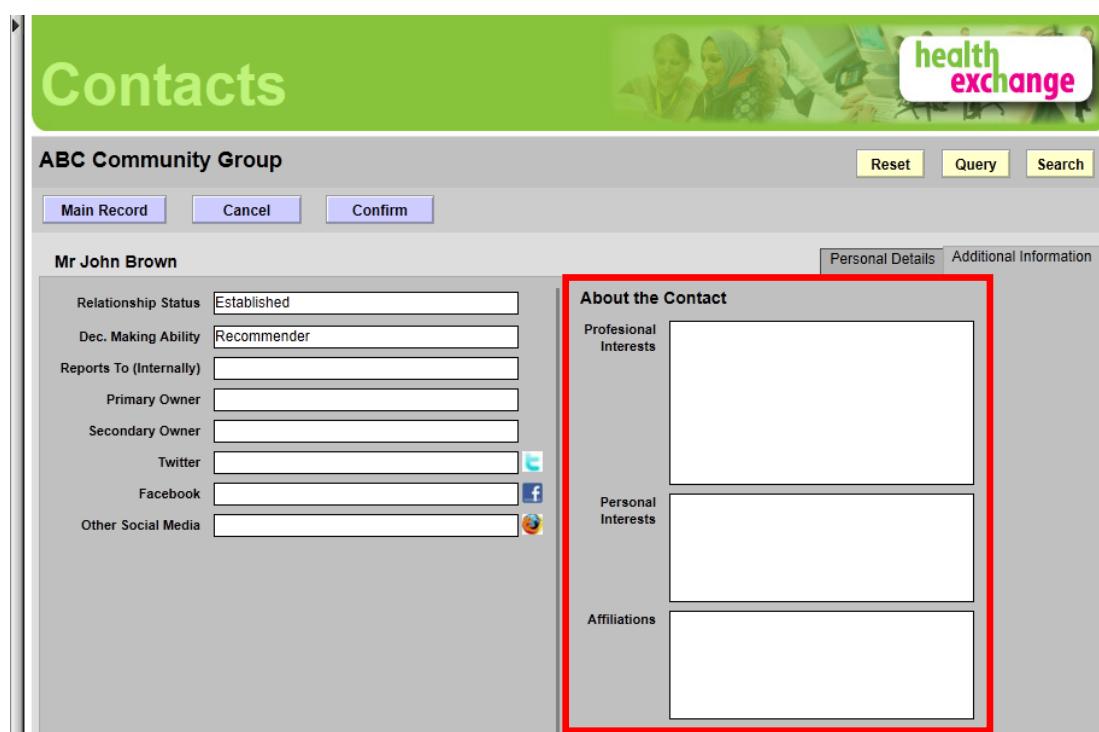
Primary and Secondary Owner fields are for listing staff members within Health Exchange who owns and manages the external relationship.

### Twitter, Facebook, and Other Social Media

These fields are for recording the individual contact's web addresses for social media sites such as Twitter.

### About the Contact

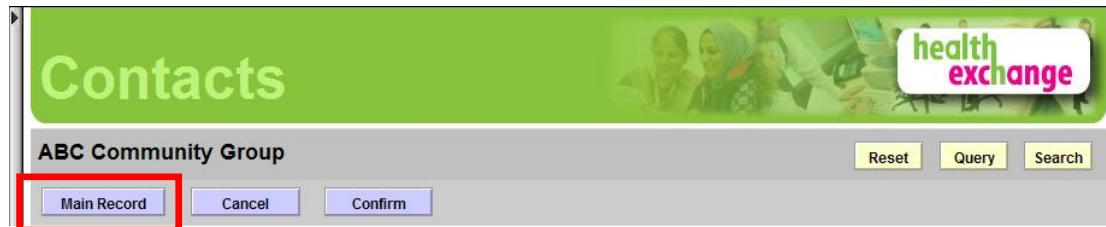
To the right of the fields listed above is a section titled *About the Contact*. These fields are for recording in-depth information on the contact, including professional and personal interests, and affiliations which the contact regularly associates with.



The screenshot shows a software application window titled 'Contacts' with a green header. The main content area is for 'ABC Community Group' and shows a contact record for 'Mr John Brown'. On the left, there is a vertical list of fields: 'Relationship Status' (Established), 'Dec. Making Ability' (Recommender), 'Reports To (Internally)' (empty), 'Primary Owner' (empty), 'Secondary Owner' (empty), 'Twitter' (with a Twitter icon), 'Facebook' (with a Facebook icon), and 'Other Social Media' (empty). On the right, there is a section titled 'About the Contact' with three sub-sections: 'Professional Interests' (empty), 'Personal Interests' (empty), and 'Affiliations' (empty). The 'About the Contact' section is highlighted with a red rectangular border. At the top right of the main content area, there are buttons for 'Reset', 'Query', and 'Search'. At the bottom right, there are tabs for 'Personal Details' and 'Additional Information'.

### **5.1.1 Getting Back to the Main Record**

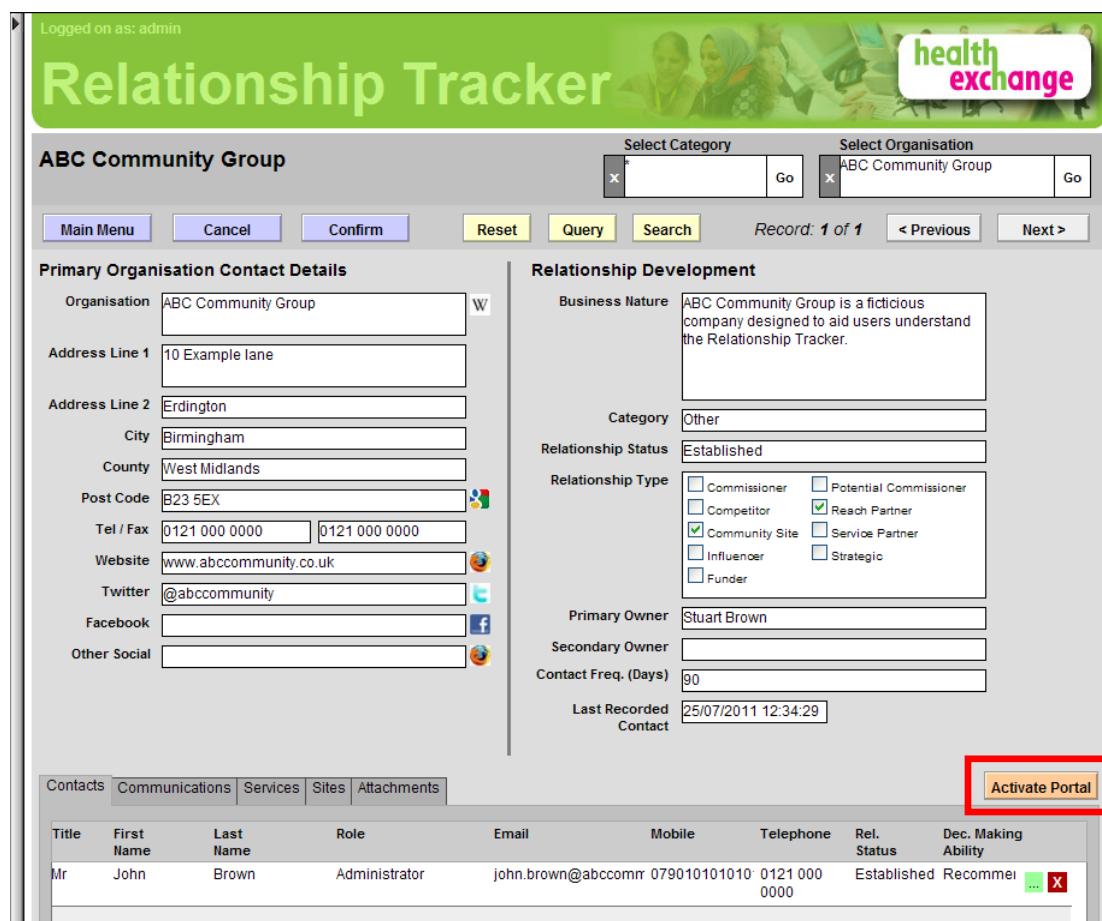
After accessing or entering information into the relevant contact fields, users can get back to the main record screen by left clicking the blue *Main Record* button at the top of the page.



### 5.2 Creating a New Contact

**Disclaimer:** For security purposes, the Relationship Tracker has an inactivity time limit of 15 minutes. This means that if the user does not use the Relationship Tracker for more than 15 minutes they will be logged out of the system. If the user fails to save their changes within this 15 minute time window, they will lose the information they have inputted. **Hence it is important to regularly save changes made by pressing the *Confirm* button.**

Creating a new contact is conducted via the record's main page.

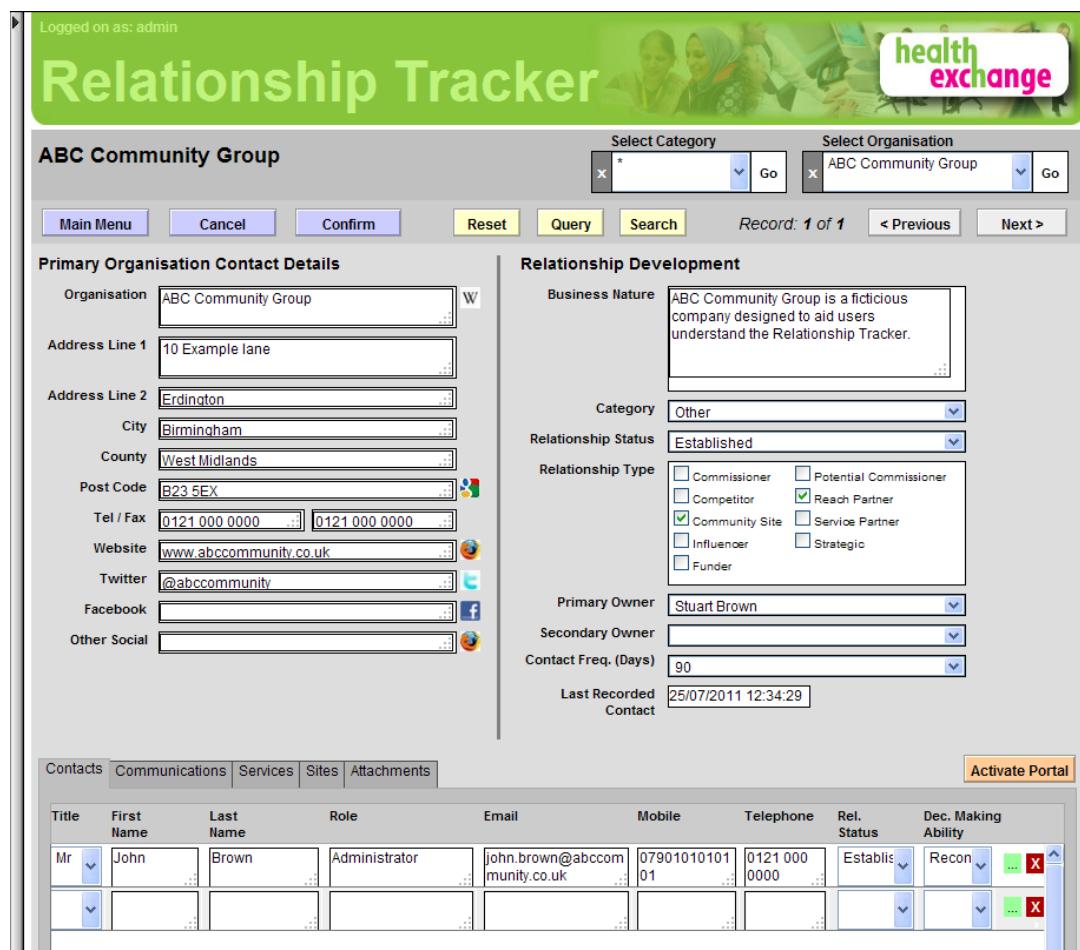


The screenshot shows the Relationship Tracker application interface. At the top, it says 'Logged on as: admin' and 'Relationship Tracker' with a 'health exchange' logo. Below that, it shows 'ABC Community Group' and two search boxes for 'Select Category' and 'Select Organisation', both set to 'ABC Community Group'. A navigation bar includes 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', 'Record: 1 of 1', and 'Next >'. The main area is divided into two sections: 'Primary Organisation Contact Details' and 'Relationship Development'. The 'Primary Organisation Contact Details' section contains fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, and Funder, with 'Community Site' checked), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). At the bottom, there are tabs for 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments', and an 'Activate Portal' button which is highlighted with a red box. Below these tabs is a table with columns: Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, Dec. Making Ability, and a delete icon. The table has one row with data: Mr, John, Brown, Administrator, john.brown@abccommr, 079010101010, 0121 000 0000, Established, Recommender, and a delete icon.

The user must left click on the orange *Activate Portal* button from the right hand side of the page above the tabbed portal area.

## Relationship Tracker User Manual: V1.1

Doing so opens the record into Browse Mode, allowing users access to the displayed fields.



Logged on as: admin

# Relationship Tracker

## ABC Community Group

Main Menu Cancel Confirm Reset Query Search Record: 1 of 1 < Previous Next >

**Primary Organisation Contact Details**

Organisation	ABC Community Group
Address Line 1	10 Example lane
Address Line 2	Erdington
City	Birmingham
County	West Midlands
Post Code	B23 5EX
Tel / Fax	0121 000 0000
Website	www.abccommunity.co.uk
Twitter	@abccommunity
Facebook	
Other Social	

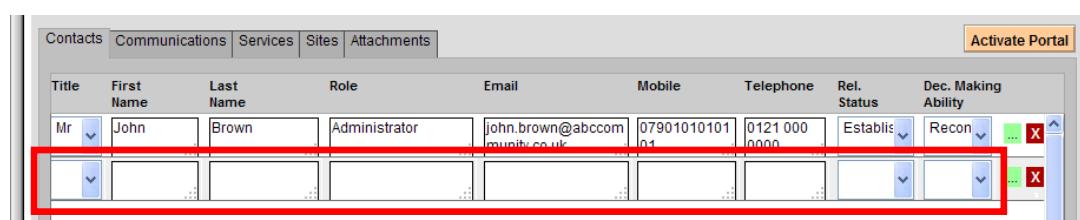
**Relationship Development**

Business Nature	ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.
Category	Other
Relationship Status	Established
Relationship Type	<input type="checkbox"/> Commissioner <input type="checkbox"/> Potential Commissioner <input type="checkbox"/> Competitor <input checked="" type="checkbox"/> Reach Partner <input checked="" type="checkbox"/> Community Site <input type="checkbox"/> Service Partner <input type="checkbox"/> Influencer <input type="checkbox"/> Strategic <input type="checkbox"/> Funder
Primary Owner	Stuart Brown
Secondary Owner	
Contact Freq. (Days)	90
Last Recorded Contact	25/07/2011 12:34:29

**Contacts** **Communications** **Services** **Sites** **Attachments** **Activate Portal**

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	0790101010101	0121 000 0000	Established	Recon

To add a new contact, simply start entering information from the row directly below our previous entry for Mr John Brown.

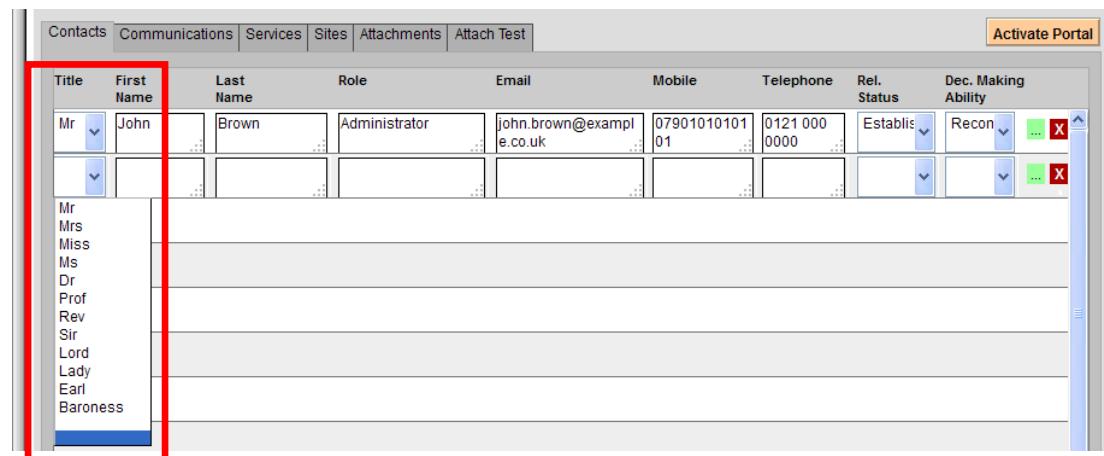


**Contacts** **Communications** **Services** **Sites** **Attachments** **Activate Portal**

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	0790101010101	0121 000 0000	Established	Recon

## Relationship Tracker User Manual: V1.1

Left clicking on the drop-down menu fields allows the user to select an option from the prescribed list.

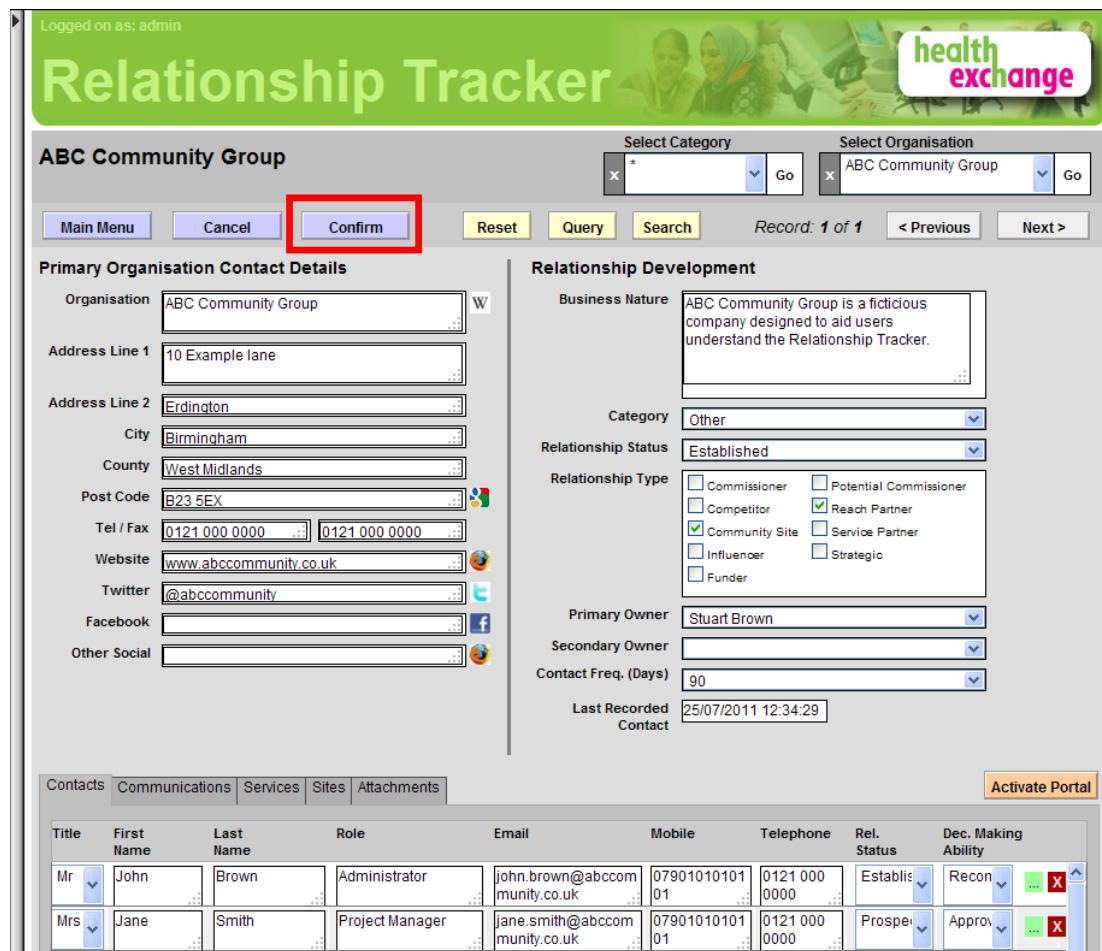


For text fields such as *First Name* and *Email*, simply left click within the field and enter the necessary information.



## Relationship Tracker User Manual: V1.1

To save your new contact, left click on the blue *Confirm* button at the top of the page.



The screenshot shows the 'ABC Community Group' contact entry screen. The 'Confirm' button is highlighted with a red box. The 'Primary Organisation Contact Details' section contains fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook (Facebook URL), and Other Social (Other Social URL). The 'Relationship Development' section includes fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (checkboxes for Commissioner, Competitor, Community Site, Influencer, Potential Commissioner, Reach Partner, Service Partner, Strategic, Funder), Primary Owner (Stuart Brown), Secondary Owner (empty), Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). The 'Contacts' tab is selected in the bottom navigation bar, showing a table with two rows: Mr. John Brown (Administrator) and Mrs. Jane Smith (Project Manager). The 'Activate Portal' button is located in the top right corner of the main content area.

Alternatively, if you wish to cancel saving the new contact row, left click on the *Cancel* button instead.



The screenshot shows the 'ABC Community Group' contact entry screen. The 'Cancel' button is highlighted with a red box. The 'Primary Organisation Contact Details' section contains fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook (Facebook URL), and Other Social (Other Social URL). The 'Relationship Development' section includes fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (checkboxes for Commissioner, Competitor, Community Site, Influencer, Potential Commissioner, Reach Partner, Service Partner, Strategic, Funder), Primary Owner (Stuart Brown), Secondary Owner (empty), Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). The 'Contacts' tab is selected in the bottom navigation bar, showing a table with two rows: Mr. John Brown (Administrator) and Mrs. Jane Smith (Project Manager). The 'Activate Portal' button is located in the top right corner of the main content area.

If users wish to add more in-depth information for a particular contact, they can do so by left clicking on the green button in the tabbed portal (highlighted below).

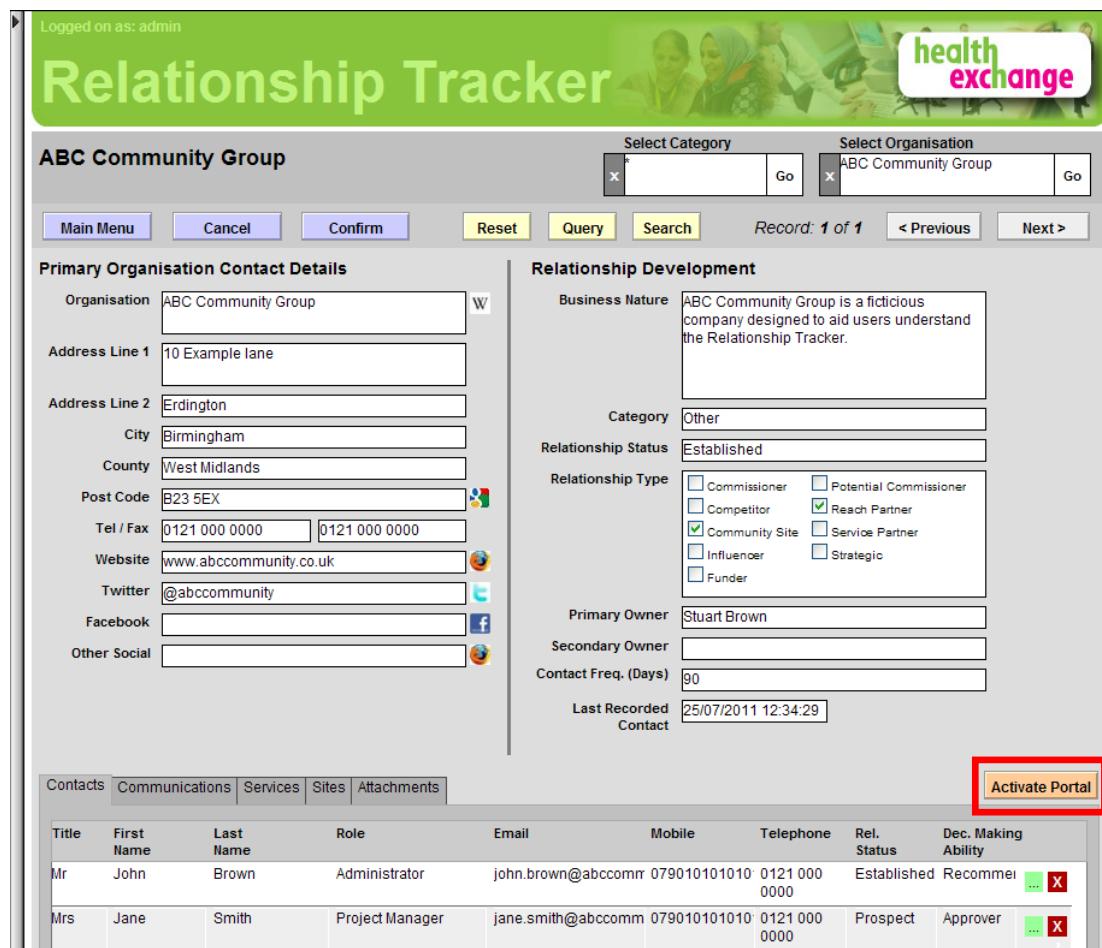


The screenshot shows the 'ABC Community Group' contact entry screen. The 'Activate Portal' button in the tabbed portal is highlighted with a red box. The 'Primary Organisation Contact Details' section contains fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook (Facebook URL), and Other Social (Other Social URL). The 'Relationship Development' section includes fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (checkboxes for Commissioner, Competitor, Community Site, Influencer, Potential Commissioner, Reach Partner, Service Partner, Strategic, Funder), Primary Owner (Stuart Brown), Secondary Owner (empty), Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). The 'Contacts' tab is selected in the bottom navigation bar, showing a table with two rows: Mr. John Brown (Administrator) and Mrs. Jane Smith (Project Manager). The 'Activate Portal' button is located in the top right corner of the main content area.

### 5.3 Amending Contact Details

Users may also need to change or amend the recorded contacts listed for an organisation. For example, you may wish to change a contact's email address or update their Decision Making Ability listing.

To do this, left click on the *Activate Portal* button to enter Browse Mode.



The screenshot shows the 'Relationship Tracker' software interface. At the top, it says 'Logged on as: admin' and 'Relationship Tracker' with the 'health exchange' logo. Below that, it shows 'ABC Community Group' details. On the left, there's a 'Primary Organisation Contact Details' section with fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook, and Other Social. On the right, there's a 'Relationship Development' section with fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Services Partner, Influencer, and Funder, with 'Community Site' checked), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). At the bottom, there's a table of contacts with columns for Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, Dec. Making Ability, and Actions. The 'Activate Portal' button is highlighted with a red box.

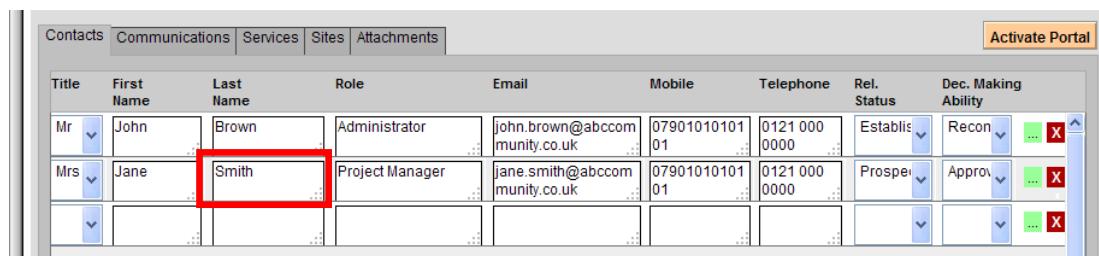
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability	Actions
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommender	...
Mrs	Jane	Smith	Project Manager	jane.smith@abccomm	079010101010	0121 000 0000	Prospect	Approver	...

#### 5.3.1 Amendment Example

For example purposes imagine that Jane Smith changed her last name to Jones. To make this amendment the user would first need to left click on the *Activate Portal* button seen above.

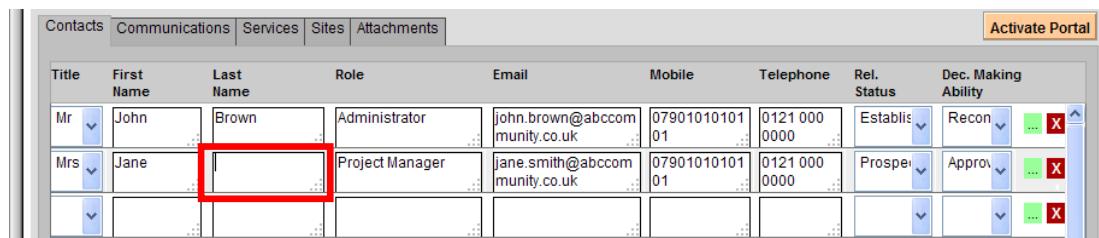
## Relationship Tracker User Manual: V1.1

The next step is to highlight the text in the Last Name field and delete *Smith*.



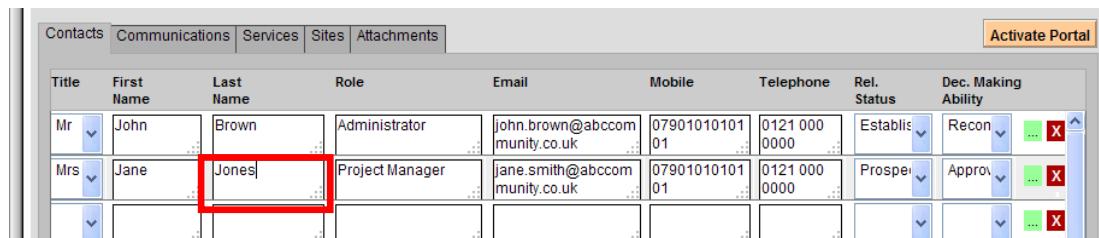
Contacts	Communications	Services	Sites	Attachments	Activate Portal			
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	0790101010101	0121 000 0000	Established	Recon...
Mrs	Jane	Smith	Project Manager	jane.smith@abccommunity.co.uk	0790101010101	0121 000 0000	Prospective	Approv...
								...

Clearing *Smith* from the *Last Name* field then allows the user to input the correct name.



Contacts	Communications	Services	Sites	Attachments	Activate Portal			
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	0790101010101	0121 000 0000	Established	Recon...
Mrs	Jane		Project Manager	jane.smith@abccommunity.co.uk	0790101010101	0121 000 0000	Prospective	Approv...
								...

*Jones* can now be typed into the field.



Contacts	Communications	Services	Sites	Attachments	Activate Portal			
Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	0790101010101	0121 000 0000	Established	Recon...
Mrs	Jane	Jones	Project Manager	jane.smith@abccommunity.co.uk	0790101010101	0121 000 0000	Prospective	Approv...
								...

Left clicking the *Confirm* button at the top of the page will save this amendment to the record.



Logged on as: admin

# Relationship Tracker

ABC Community Group

Select Category: \* Go    Select Organisation: ABC Community Group Go

Main Menu    Cancel    **Confirm**    Reset    Query    Search    Record: 1 of 1    < Previous    Next >

N.B. The process for amending details is exactly the same for the in-depth contact view apart from the use of the orange *Activate Portal* button. Instead, users can simply left click on the relevant field they wish to amend in order to open the record in browse mode.

## 6.0 Accessing and Creating Communications

As Health Exchange staff members interact with external organisations they will inevitably learn new things and gain important information relevant to colleagues. The Relationship Tracker provides a method of recording important communications gained in various ways including emails, face-to-face conversations, meetings, letters and telephone calls. This information can then be shared and accessed by those who need it within Health Exchange.

The process of accessing or recording a communication is very similar to the one used to access a contact. The user must first start by recalling the record they wish to view. In this case we will be viewing the *ABC Community* record seen below.

Logged on as: admin

# Relationship Tracker

health exchange

**ABC Community Group**

Primary Organisation Contact Details

Organisation	ABC Community Group
Address Line 1	10 Example lane
Address Line 2	Erdington
City	Birmingham
County	West Midlands
Post Code	B23 5EX
Tel / Fax	0121 000 0000
Website	www.abccommunity.co.uk
Twitter	@abccommunity
Facebook	
Other Social	

Relationship Development

Business Nature	ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker.
Category	Other
Relationship Status	Established
Relationship Type	<input type="checkbox"/> Commissioner <input type="checkbox"/> Potential Commissioner <input type="checkbox"/> Competitor <input checked="" type="checkbox"/> Reach Partner <input checked="" type="checkbox"/> Community Site <input type="checkbox"/> Service Partner <input type="checkbox"/> Influencer <input type="checkbox"/> Strategic <input type="checkbox"/> Funder
Primary Owner	Stuart Brown
Secondary Owner	
Contact Freq. (Days)	90
Last Recorded Contact	25/07/2011 12:34:29

Activate Portal

Contacts **Communications** Services Sites Attachments

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommender
Mrs	Jane	Smith	Project Manager	jane.smith@abccomm	079010101010	0121 000 0000	Prospect	Approver

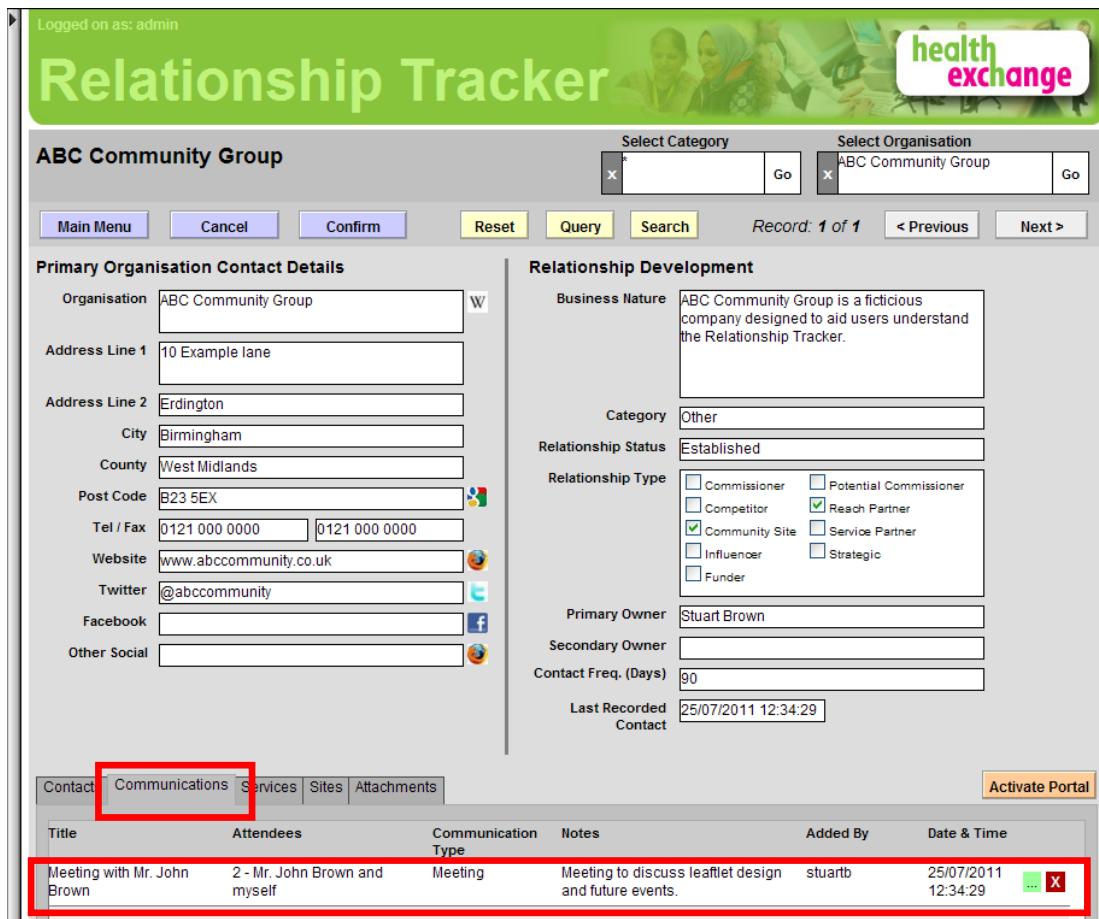
When viewing the organisation record, the *Contacts* tab is selected by default. To view communications associated with the record, we will need to left click on the *Communications* tab.

Contacts **Communications** Services Sites Attachments

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommr	079010101010	0121 000 0000	Established	Recommender

## Relationship Tracker User Manual: V1.1

Now that we have the *Communications* tab selected we can view the communications which members of Health Exchange have added for the organisation in question (in this case our organisation is named *ABC Community Group*).



The screenshot shows the 'Relationship Tracker' application interface. At the top, there are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and navigation links 'Record: 1 of 1', '< Previous', and 'Next >'. Below this, there are two search boxes: 'Select Category' and 'Select Organisation', both with 'Go' buttons. The main area is divided into two sections: 'ABC Community Group' (Primary Organisation Contact Details) and 'Relationship Development'. The 'ABC Community Group' section contains fields for Organisation (ABC Community Group), Address Line 1 (10 Example lane), Address Line 2 (Erdington), City (Birmingham), County (West Midlands), Post Code (B23 5EX), Tel / Fax (0121 000 0000), Website (www.abccommunity.co.uk), Twitter (@abccommunity), Facebook, and Other Social. The 'Relationship Development' section includes fields for Business Nature (ABC Community Group is a fictitious company designed to aid users understand the Relationship Tracker), Category (Other), Relationship Status (Established), Relationship Type (checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, Strategic, and Funder, with 'Community Site' checked), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact (25/07/2011 12:34:29). At the bottom, there is a navigation bar with tabs 'Contact', 'Communications' (which is highlighted with a red box), 'Services', 'Sites', and 'Attachments', and an 'Activate Portal' button. Below the tabs is a table with columns 'Title', 'Attendees', 'Communication Type', 'Notes', 'Added By', and 'Date & Time'. A single entry is listed: 'Meeting with Mr. John Brown' (Title), '2 - Mr. John Brown and myself' (Attendees), 'Meeting' (Communication Type), 'Meeting to discuss leaflet design and future events.' (Notes), 'stuartb' (Added By), and '25/07/2011 12:34:29' (Date & Time). There are also 'Edit' and 'Delete' icons for this entry.

As seen above, there is one entry added for this *ABC Community Group* so far.

### Title

This field is used to describe in concise terms what the communication involved. Users may wish to add where, if relevant, the communication has taken place.

### Attendees

If relevant, the user can add who attended the communication<sup>10</sup>.

### Communication Type

This field is a drop-down menu where the user can select what type of communication they had with the individual from the organisation.

### Notes

Details of what the communication entailed can be added in the *Notes* field.

<sup>10</sup> This is particularly useful if the communication type was a meeting. However it is of little relevance if the correspondence was made by email or telephone and hence can be left blank.

## Relationship Tracker User Manual: V1.1

### Added By

This field is automatically generated by the Relationship Tracker, recording the individual's username who added the communication. For example, if James Kay added the communication, the username would be listed in this field as *JamesK*.

### Date & Time

The *Date & Time* field is another automatically generated field recording when the user inputted the communication.

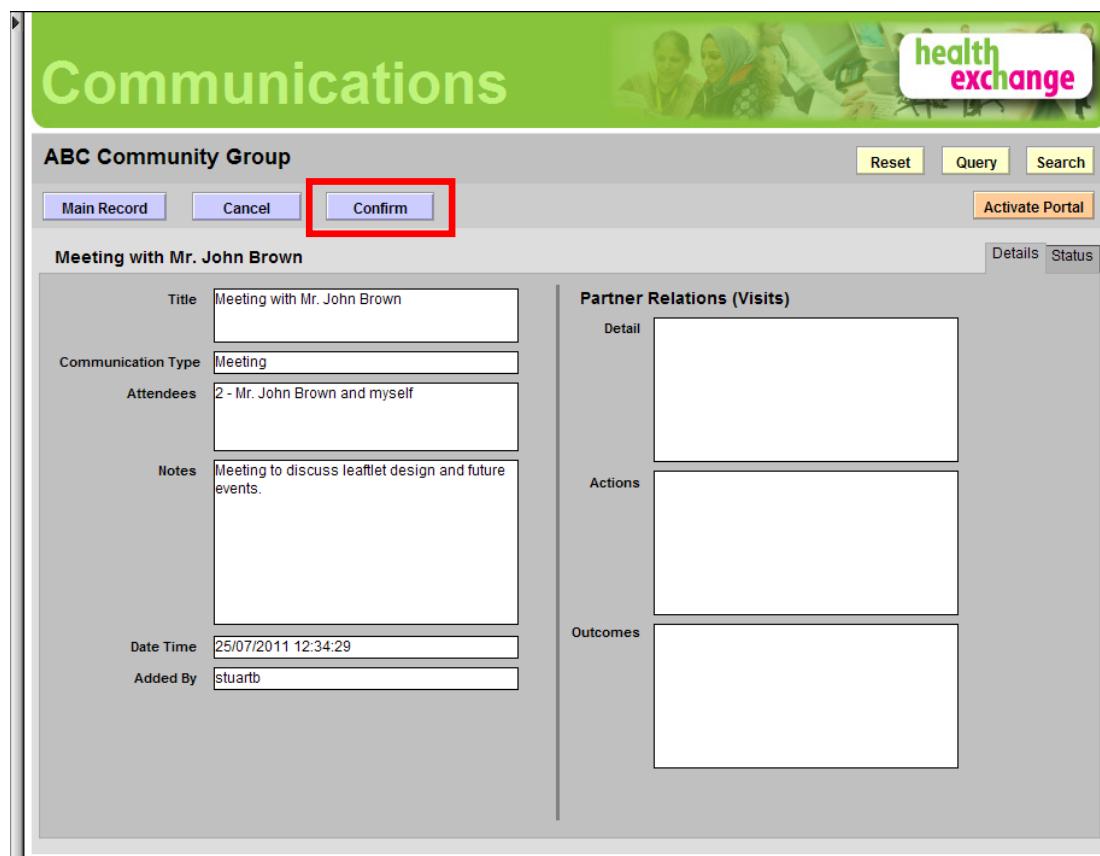
## 6.1 Accessing the Communication's in-depth View

Just like the contacts page discussed in the previous chapter, the Communications page also has an in-depth view. This is accessed by left clicking on the green button.



Contacts	Communications	Services	Sites	Attachments	Activate Portal
Title	Attendees	Communication Type	Notes	Added By	Date & Time
Meeting with Mr. John Brown	2 - Mr. John Brown and myself	Meeting	Meeting to discuss leaflet design and future events.	stuartb	25/07/2011 12:34:29 

The in-depth communications view will then be presented.



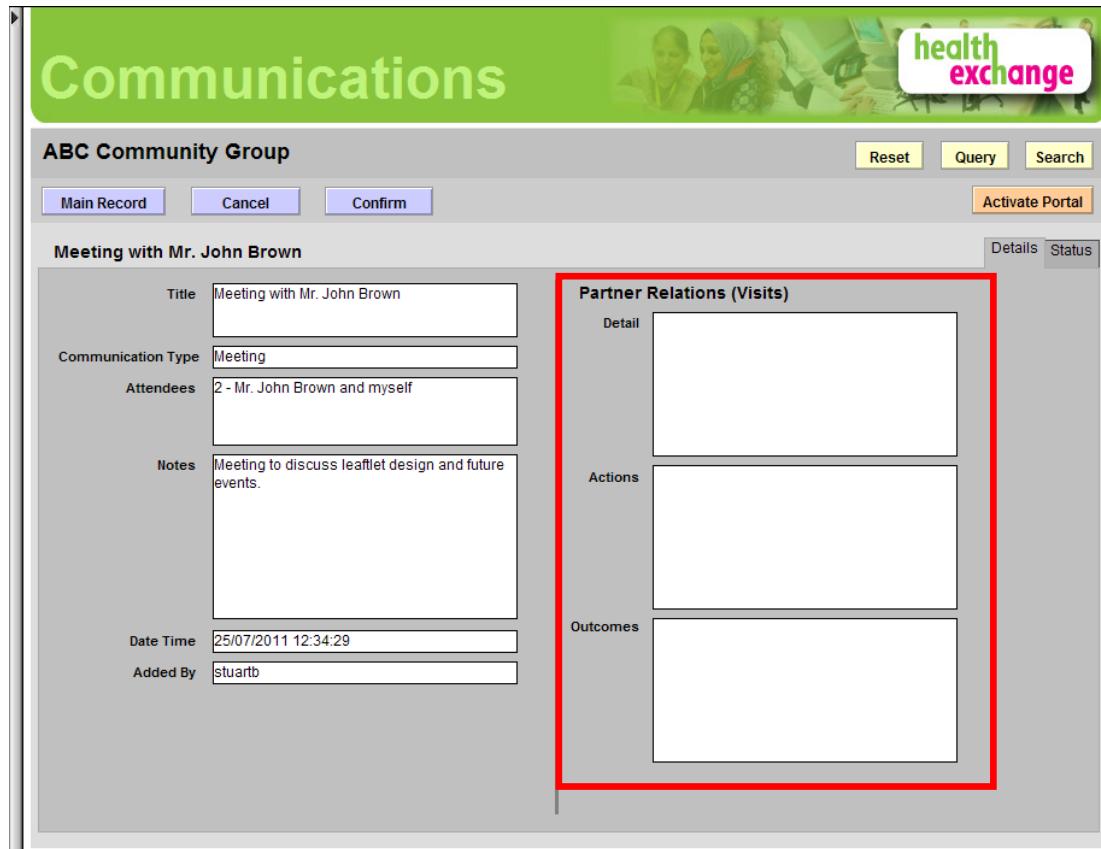
ABC Community Group

Meeting with Mr. John Brown

Main Record Cancel Confirm Confirm X Delete Edit Print Email Share Report Archive Delete Edit Print <span style="border: 1px

## Relationship Tracker User Manual: V1.1

As seen below, on the right hand side of the page is three fields relating to *Partner Relations (Visits)*. As the title suggests, these are fields specifically for the Partner Relations team to record information on their visits to the organisation.



The screenshot shows a 'Communications' page for 'ABC Community Group'. The main content area is titled 'Meeting with Mr. John Brown'. On the right, there is a section titled 'Partner Relations (Visits)' which is highlighted with a red box. This section contains three sub-sections: 'Detail', 'Actions', and 'Outcomes', each with a large empty white box for input.

Users may also notice another tab on this page called *Status*. This, again, is solely used by the Partner Relations team<sup>11</sup>.

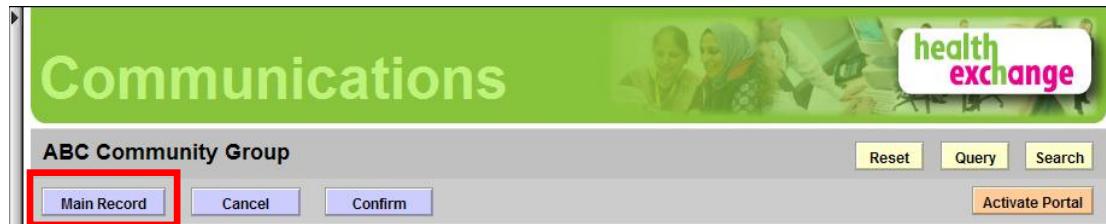


The screenshot shows the same 'Communications' page as above, but the 'Status' tab is highlighted with a red box in the top right corner of the header area.

<sup>11</sup> Only users with higher user access levels will be able to see this content due to its potentially sensitive nature.

## Relationship Tracker User Manual: V1.1

The user can navigate back to the main record page by left clicking on the blue *Main Record* button.



## 7.0 Creating an Organisation Record

N.B. Before creating a new record it is important to first check whether the organisation has already been created within the Relationship Tracker. [See chapter 4.0](#) for further details on how to find organisation records.

As well as creating contacts and communication records for existing external organisations, users may also need to create new records for those organisations not yet inputted within the Relationship Tracker.

If a record for the organisation is not present on the Relationship Tracker, users can request their line manager (lead or senior manager) to create the record. The following protocol advises users on how this should be carried out.

### 7.1 Record Creation Protocol

1. The user makes sure that a record for the organisation in mind does not exist.  

2. The user contacts their line manager requesting them to create the new record.  

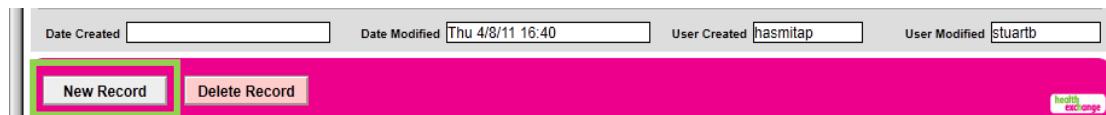
3. Basic name, address, and contact details are supplied by the user to the line manager.  

4. The line manager creates the new record based on these details and notifies the user.  

5. The user is then free to add further information, such as contacts and communications, to the new record.

### 7.2 Record Creation Guide

Creating a new organisation record is a simple process and involves scrolling down to the bottom of the main record page layout. At the bottom of the layout we can see the footer section. Left clicking the *New Record* button highlighted below in green will start the creation process.



Doing so will present a new blank record.

A screenshot of the Relationship Tracker record creation form. The top navigation bar shows 'Logged on as: stuartb' and the 'Relationship Tracker' logo. The main form is divided into two sections: 'Primary Organisation Contact Details' on the left and 'Relationship Development' on the right. The 'Primary Organisation Contact Details' section contains fields for Organisation, Address Line 1, Address Line 2, City, County, Post Code, Tel / Fax, Website, Twitter, Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature, Category (set to 'Other'), Relationship Status, Relationship Type (checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Service Partner, Influencer, Strategic, and Funder), Primary Owner, Secondary Owner, Contact Freq. (Days) (set to 90), and Last Recorded Contact. At the top of the form are buttons for Main Menu, Cancel, Confirm, Reset, Query, Search, and navigation links for Record: 260 of 260, < Previous, and Next >. The 'New Record' button from the previous screenshot is highlighted with a green box.

The user must now enter information into key fields including *Organisation*, as well some basic address details.

### 7.3 Record Creation Example

For the purpose of this example, a record will be created for a fictitious organisation named *DEF Advice Centre*.

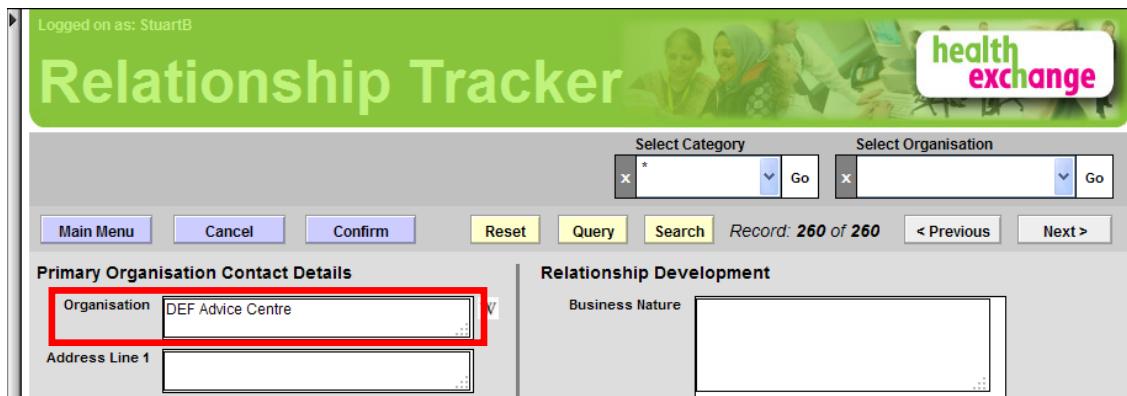
As noted above, the first step is to scroll down to the bottom of the page and left click the *New Record* button in the footer section.

## Relationship Tracker User Manual: V1.1



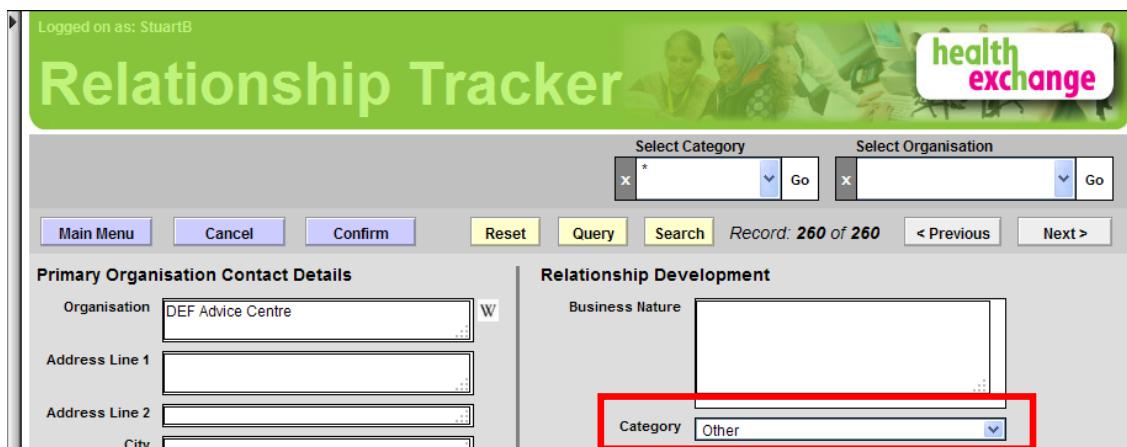
The screenshot shows the top navigation bar of the Relationship Tracker application. It includes fields for 'Date Created' (Fri 5/8/11 12:25), 'Date Modified' (Fri 5/8/11 12:25), 'User Created' (StuartB), and 'User Modified' (StuartB). Below these are two buttons: 'New Record' (highlighted with a green border) and 'Delete Record'. The 'health exchange' logo is visible in the top right corner.

We will now need to enter the organisation name *DEF Advice Centre* into the *Organisation* field.



The screenshot shows the 'Relationship Tracker' interface. The 'Primary Organisation Contact Details' section is visible, with the 'Organisation' field containing 'DEF Advice Centre' highlighted by a red box. The 'Relationship Development' section shows a 'Business Nature' field and a 'Category' field which is currently set to 'Other'.

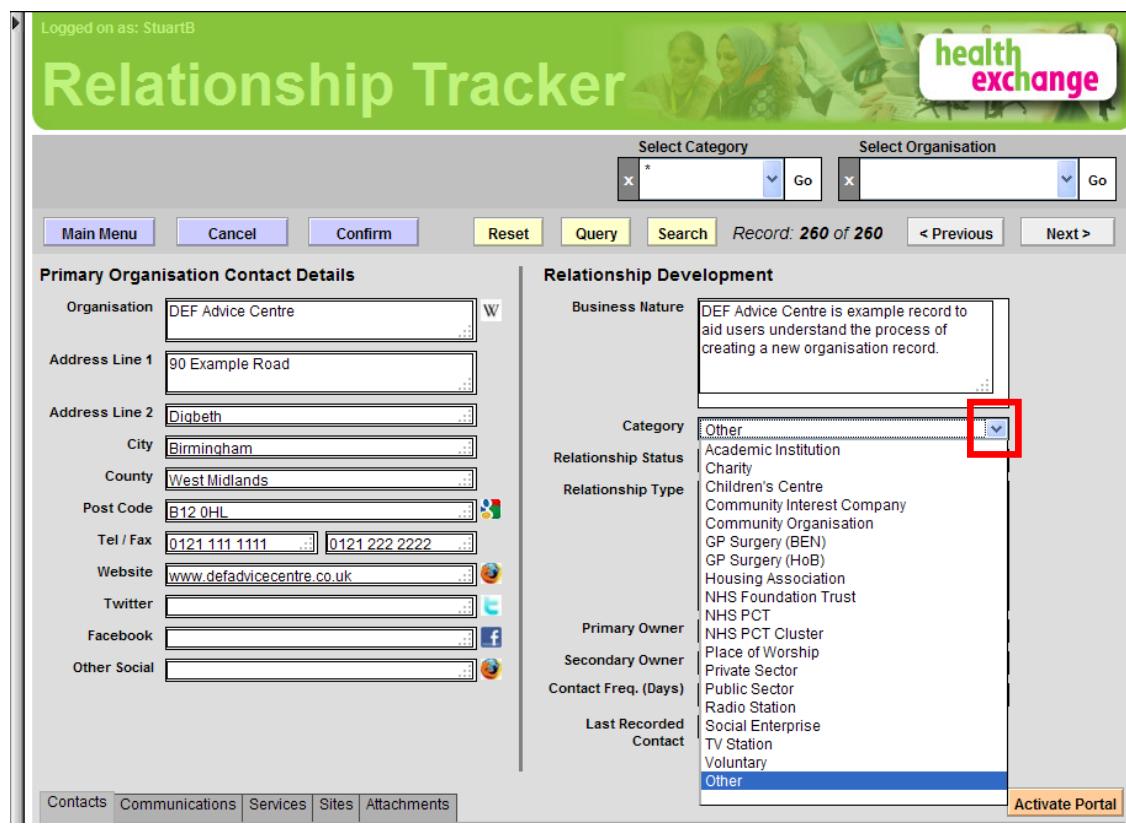
N.B. The *Category* field listed under the *Relationship Development* area defaults to *Other*. To choose more suitable category, the user must choose from another category from the drop-down menu selection list.



The screenshot shows the 'Relationship Tracker' interface. The 'Primary Organisation Contact Details' section is visible, with the 'Organisation' field containing 'DEF Advice Centre' highlighted by a red box. The 'Relationship Development' section shows a 'Business Nature' field and a 'Category' field which is currently set to 'Other' and highlighted by a red box.

## Relationship Tracker User Manual: V1.1

Left clicking on the drop-down menu chevron arrow will present the category list to the user.



Logged on as: StuartB

# Relationship Tracker

health exchange

Select Category      Select Organisation

Main Menu      Cancel      Confirm      Reset      Query      Search      Record: 260 of 260      < Previous      Next >

**Primary Organisation Contact Details**

Organisation	DEF Advice Centre
Address Line 1	90 Example Road
Address Line 2	Digbeth
City	Birmingham
County	West Midlands
Post Code	B12 0HL
Tel / Fax	0121 111 1111      0121 222 2222
Website	<a href="http://www.defadvicecentre.co.uk">www.defadvicecentre.co.uk</a>
Twitter	
Facebook	
Other Social	

**Relationship Development**

Business Nature: DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.

Category: Other (selected)

Relationship Status:

Relationship Type:

Primary Owner:

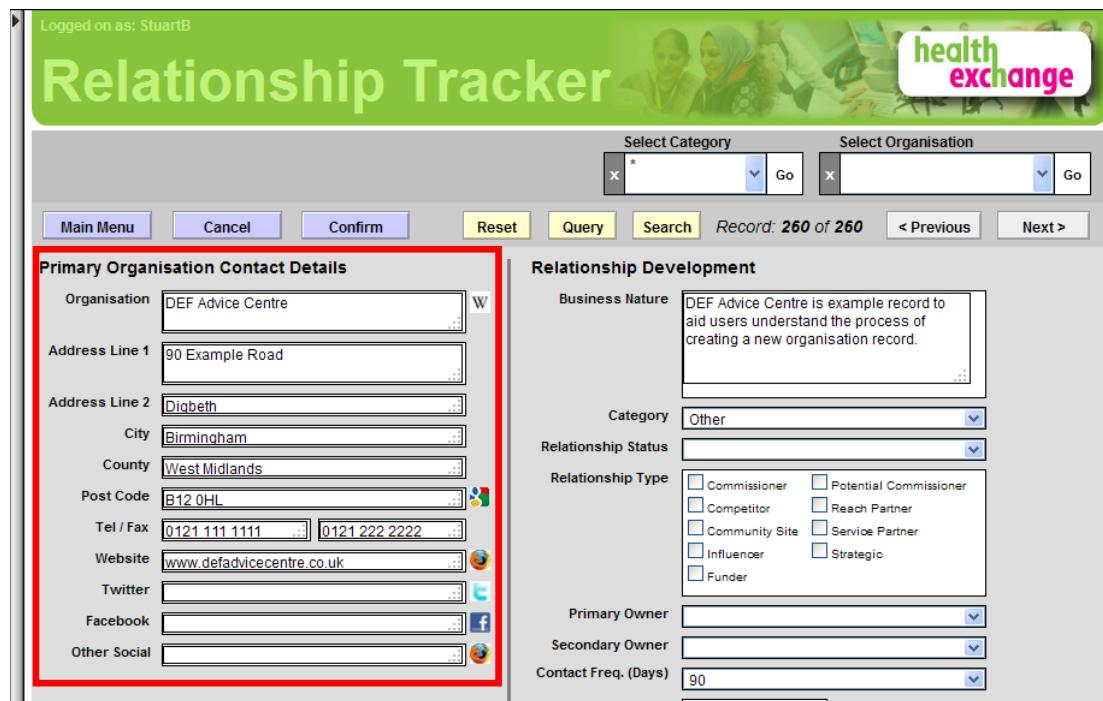
Secondary Owner:

Contact Freq. (Days):

Last Recorded Contact:

Activate Portal

The user can now enter address and contact fields found under the *Primary Organisation Contact Details* title.



Logged on as: StuartB

# Relationship Tracker

health exchange

Select Category      Select Organisation

Main Menu      Cancel      Confirm      Reset      Query      Search      Record: 260 of 260      < Previous      Next >

**Primary Organisation Contact Details**

Organisation	DEF Advice Centre
Address Line 1	90 Example Road
Address Line 2	Digbeth
City	Birmingham
County	West Midlands
Post Code	B12 0HL
Tel / Fax	0121 111 1111      0121 222 2222
Website	<a href="http://www.defadvicecentre.co.uk">www.defadvicecentre.co.uk</a>
Twitter	
Facebook	
Other Social	

**Relationship Development**

Business Nature: DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.

Category: Other

Relationship Status:

Relationship Type:

- Commissioner       Potential Commissioner
- Competitor       Reach Partner
- Community Site       Service Partner
- Influencer       Strategic
- Funder

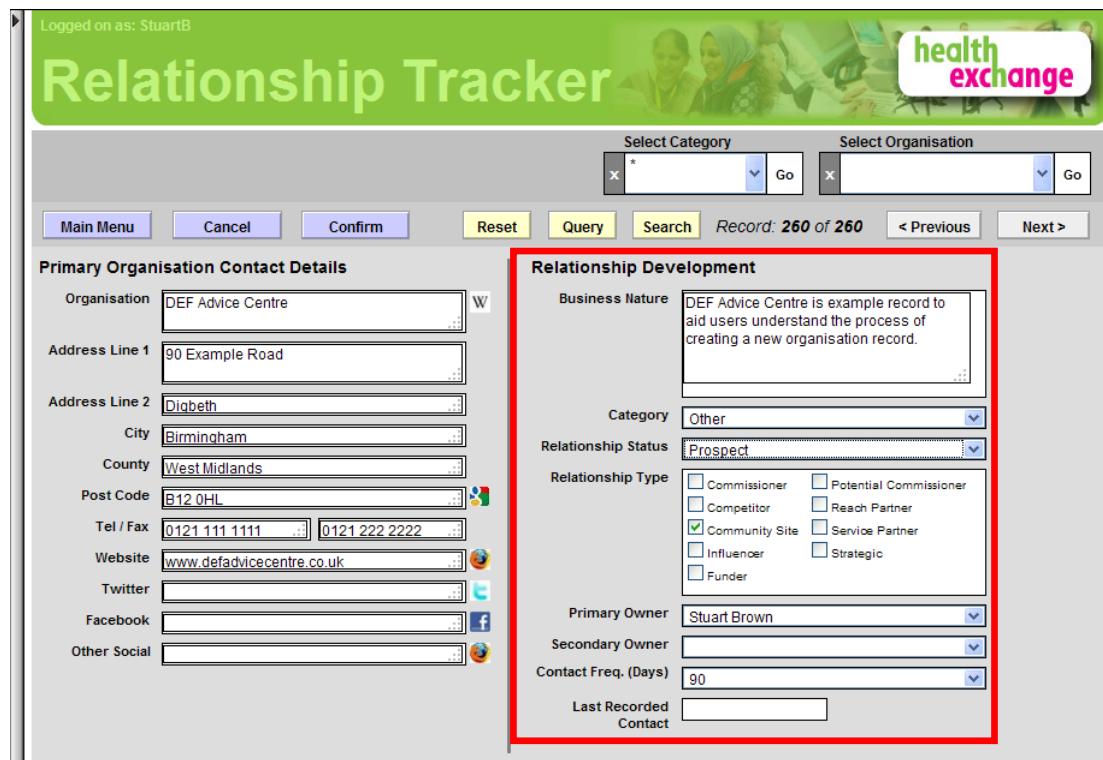
Primary Owner:

Secondary Owner:

Contact Freq. (Days): 90

## Relationship Tracker User Manual: V1.1

Information can also be added into the *Relationship Development* section highlighted below.



The screenshot shows the 'Relationship Tracker' application interface. On the left, there is a section titled 'Primary Organisation Contact Details' containing various input fields for organization information. On the right, a section titled 'Relationship Development' is highlighted with a red box. This section includes fields for 'Business Nature' (with a note about DEF Advice Centre being an example record), 'Category' (set to 'Other'), 'Relationship Status' (set to 'Prospect'), 'Relationship Type' (checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site, Services Partner, Influencer, and Strategic, with 'Community Site' checked), 'Primary Owner' (Stuart Brown), 'Secondary Owner' (empty), 'Contact Freq. (Days)' (90), and 'Last Recorded Contact' (empty). At the top of the page, there are 'Select Category' and 'Select Organisation' dropdowns. Below the top navigation, there are buttons for 'Main Menu', 'Cancel', 'Confirm', 'Reset', 'Query', 'Search', and navigation links for 'Record: 260 of 260', '< Previous', and 'Next >'. The status bar at the top left says 'Logged on as: StuartB'.

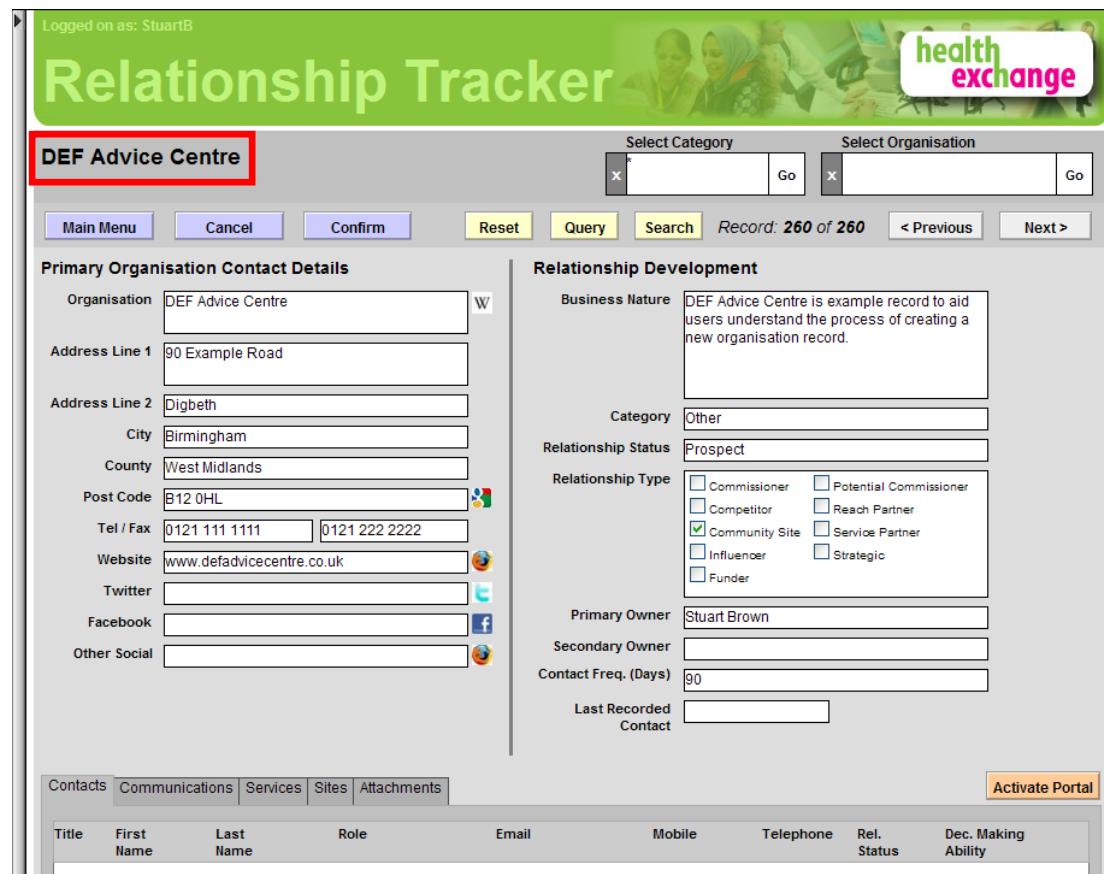
After entering the necessary information into the relevant fields, users can press the *Confirm* button to save inputted data. Alternatively, the user can press the *Cancel* button which will remove the new record.



The screenshot shows the 'Relationship Tracker' application interface. The 'Relationship Development' section is no longer highlighted with a red box. The 'Confirm' button in the bottom left of the main area is highlighted with a red box. The rest of the interface is identical to the previous screenshot, including the 'Primary Organisation Contact Details' section on the left and the top navigation bar with 'Select Category' and 'Select Organisation' dropdowns.

## Relationship Tracker User Manual: V1.1

After successfully saving the record, users will be able to see the name of the record, in this case *DEF Advice Centre*, at the top of the page in the header section.



The screenshot shows the 'Relationship Tracker' application interface. At the top, it says 'Logged on as: StuartB'. The main title 'Relationship Tracker' is displayed in a large green header. The record name 'DEF Advice Centre' is highlighted with a red box. The interface is divided into two main sections: 'Primary Organisation Contact Details' on the left and 'Relationship Development' on the right. The 'Primary Organisation Contact Details' section contains fields for Organisation (DEF Advice Centre), Address Line 1 (90 Example Road), Address Line 2 (Digbeth), City (Birmingham), County (West Midlands), Post Code (B12 0HL), Tel / Fax (0121 111 1111 / 0121 222 2222), Website (www.defadvicecentre.co.uk), Twitter, Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature (with a note: 'DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.'), Category (Other), Relationship Status (Prospect), Relationship Type (with checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site (checked), Service Partner, Influencer, and Strategic), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact. At the bottom, there are tabs for Contacts, Communications, Services, Sites, and Attachments, and a 'Activate Portal' button. A footer table shows columns for Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability.

New contacts or communications can now be added using the instructions found in previous chapters.

Users may also wish to note that the Record Selection Text has changed to *Record: 260 of 260*.



The screenshot shows the 'Relationship Tracker' application interface. At the top, it says 'Logged on as: StuartB'. The main title 'Relationship Tracker' is displayed in a large green header. The record name 'DEF Advice Centre' is visible. The interface is divided into two main sections: 'Primary Organisation Contact Details' on the left and 'Relationship Development' on the right. The 'Primary Organisation Contact Details' section contains fields for Organisation (DEF Advice Centre), Address Line 1 (90 Example Road), Address Line 2 (Digbeth), City (Birmingham), County (West Midlands), Post Code (B12 0HL), Tel / Fax (0121 111 1111 / 0121 222 2222), Website (www.defadvicecentre.co.uk), Twitter, Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature (with a note: 'DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.'), Category (Other), Relationship Status (Prospect), Relationship Type (with checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site (checked), Service Partner, Influencer, and Strategic), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact. At the bottom, there are tabs for Contacts, Communications, Services, Sites, and Attachments, and a 'Activate Portal' button. A footer table shows columns for Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability.

As seen below, date and user creation fields have also been stored within the footer section.



The screenshot shows the 'Relationship Tracker' application interface. At the top, it says 'Logged on as: StuartB'. The main title 'Relationship Tracker' is displayed in a large green header. The record name 'DEF Advice Centre' is visible. The interface is divided into two main sections: 'Primary Organisation Contact Details' on the left and 'Relationship Development' on the right. The 'Primary Organisation Contact Details' section contains fields for Organisation (DEF Advice Centre), Address Line 1 (90 Example Road), Address Line 2 (Digbeth), City (Birmingham), County (West Midlands), Post Code (B12 0HL), Tel / Fax (0121 111 1111 / 0121 222 2222), Website (www.defadvicecentre.co.uk), Twitter, Facebook, and Other Social. The 'Relationship Development' section contains fields for Business Nature (with a note: 'DEF Advice Centre is example record to aid users understand the process of creating a new organisation record.'), Category (Other), Relationship Status (Prospect), Relationship Type (with checkboxes for Commissioner, Potential Commissioner, Competitor, Reach Partner, Community Site (checked), Service Partner, Influencer, and Strategic), Primary Owner (Stuart Brown), Secondary Owner, Contact Freq. (Days) (90), and Last Recorded Contact. At the bottom, there are tabs for Contacts, Communications, Services, Sites, and Attachments, and a 'Activate Portal' button. A footer table shows columns for Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability. The footer also includes fields for Date Created (Fri 5/8/11 12:29), Date Modified (Fri 5/8/11 12:41), User Created (StuartB), User Modified (StuartB), and buttons for New Record and Delete Record.

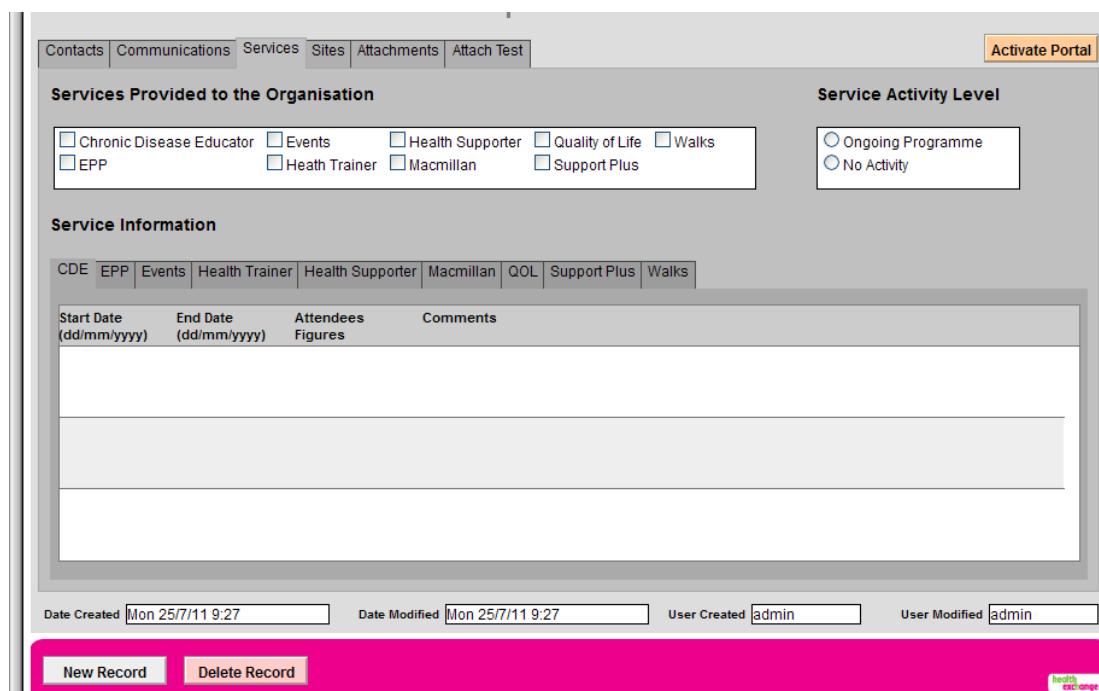
## 8.0 Other Sections of the Relationship Tracker

Having discussed how to access and input contacts and communications, as well as create organisation records, attention can now turn to other sections of the Relationship Tracker. As seen from the below screen, areas named *Services*, *Sites*, and *Attachments* are also present within the tabbed section. Each of these tabbed sections operates within the same systematic way as demonstrated in previous chapters.



### 8.1 Services

The services section is for inputting information related to Health Exchange programmes and services that have been provided to, or through, the external organisation currently being viewed.



### 8.1.1 Service Example

For example purposes, imagine if *ABC Community* were involved in Health Exchange's Health Trainer, EEP and Events services. To demonstrate this on the Relationship Tracker, users can simply left click on the corresponding checkbox set list highlighted below.

Services Provided to the Organisation

Chronic Disease Educator  Events  Health Supporter  Quality of Life  Walks  
 EPP  Heath Trainer  Macmillan  Support Plus

Service Activity Level

Ongoing Programme  No Activity

Date Created: Mon 25/7/11 9:27 Date Modified: Wed 3/8/11 14:11 User Created: admin User Modified: Stuartb

New Record Delete Record

To the right of this checkbox set list is a radio button field<sup>12</sup> entitled *Service Activity Level*. The *Service Activity Level* notifies the user as to whether Health Exchange services are currently being provided to the external organisation in question.

Services Provided to the Organisation

Chronic Disease Educator  Events  Health Supporter  Quality of Life  Walks  
 EPP  Heath Trainer  Macmillan  Support Plus

Service Activity Level

Ongoing Programme  No Activity

In our example *ABC Community Group* are currently involved in Health Exchange's services. As a result, the *Ongoing Programme* radio button should be selected to denote that Health Exchange services are currently being delivered for *ABC Community Groups*.

Services Provided to the Organisation

Chronic Disease Educator  Events  Health Supporter  Quality of Life  Walks  
 EPP  Heath Trainer  Macmillan  Support Plus

Service Activity Level

Ongoing Programme  No Activity

<sup>12</sup> Radio button fields are very similar to checkbox set lists but allow the user to select only one option.

### 8.1.2 Service Information

As seen below, *Service Information* is another section found within the services tab.

The screenshot shows a software interface for managing services. At the top, there are tabs for 'Contacts', 'Communications', 'Services', 'Sites', 'Attachments', and 'Attach Test'. An 'Activate Portal' button is in the top right. Below these are two sections: 'Services Provided to the Organisation' and 'Service Activity Level'. The 'Service Information' section is highlighted with a red border. It contains tabs for CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below these tabs are four input fields: 'Start Date (dd/mm/yyyy)', 'End Date (dd/mm/yyyy)', 'Attendees Figures', and 'Comments'. At the bottom of the page are buttons for 'New Record' and 'Delete Record'.

This area is for recording details on the services provided to the external organisation currently being viewed. Each Health Exchange service has its own tab for recording related information.

The first three tabs, *CDE*, *EEP*, and *Events*, are tabbed portals containing the following fields:

#### **Start Date (dd/mm/yyyy)**

This field is a drop-down calendar menu which allows the user to select the exact date of when the service commenced for the external organisation.

#### **End Date (dd/mm/yyyy)**

This is another drop-down calendar field where, if relevant, an end date can be inputted to detail when the service concluded at the external organisation.

#### **Attendees Figures**

The *Attendees Figures* field allows the user to add information on how many people attended a particular event or the amount of referrals obtained through the external organisation between the start and end dates.

#### **Comments**

This field is an area for detailing any additional information which users may wish to provide.

### 8.1.3 Entering Data for CDE, EEP and Events

Entering data into the CDE, EEP or Events tabbed portals can be achieved by left clicking the *Activate Portal* button.

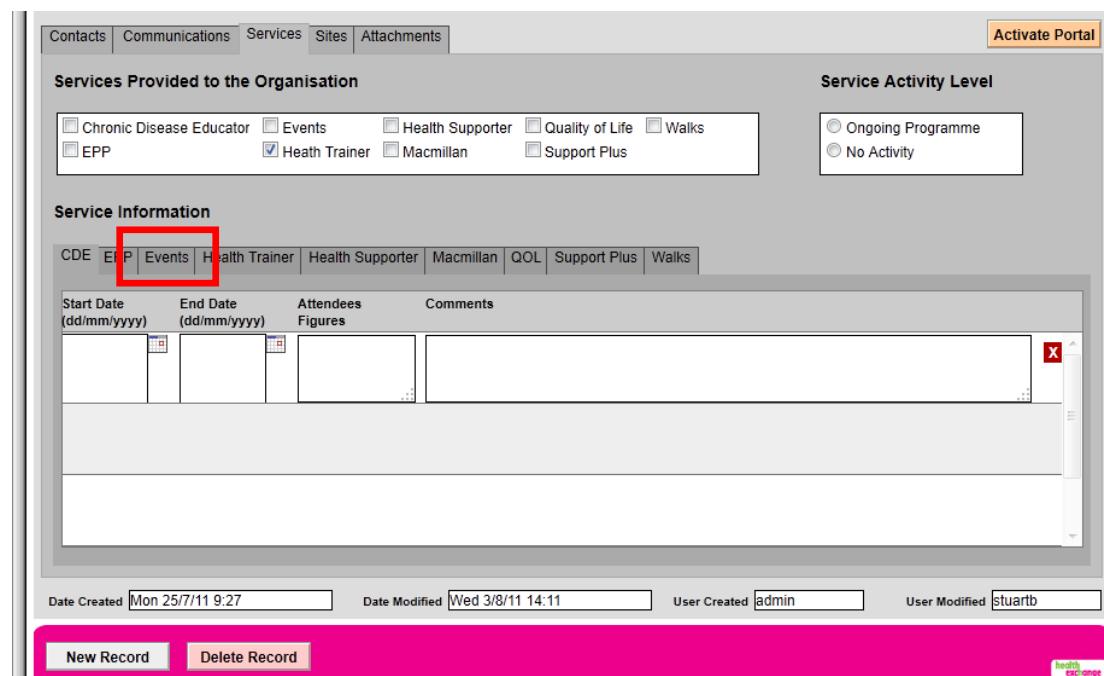
The screenshot shows the 'Services' tab selected in the top navigation bar. The 'Activate Portal' button is highlighted with a red box. The main content area contains sections for 'Services Provided to the Organisation' (with checkboxes for Chronic Disease Educator, Events, Health Supporter, Quality of Life, Walks, EPP, Health Trainer, Macmillan, and Support Plus) and 'Service Activity Level' (with radio buttons for Ongoing Programme and No Activity). Below these are tabs for 'Service Information' (CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, Walks) and 'Comments'. At the bottom, there are buttons for 'New Record' and 'Delete Record'.

The user will now have to left click the *Services* tab.

The screenshot shows the 'Services' tab selected in the top navigation bar. The 'Activate Portal' button is highlighted with a red box. The main content area is mostly empty, indicating no data is currently entered.

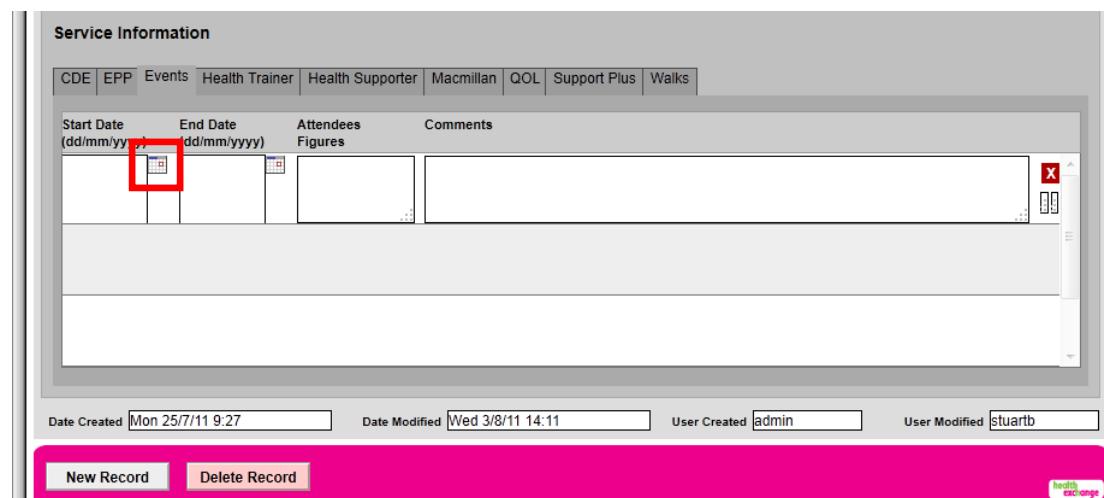
## Relationship Tracker User Manual: V1.1

After doing so it is necessary to select the relevant service tab. For this example we will be entering information in the *Events* service tab.



The screenshot shows a software interface for 'Relationship Tracker User Manual: V1.1'. At the top, there is a navigation bar with tabs: 'Contacts', 'Communications', 'Services', 'Sites', and 'Attachments'. On the far right of the navigation bar is a button labeled 'Activate Portal'. Below the navigation bar, there is a section titled 'Services Provided to the Organisation' with checkboxes for various services: Chronic Disease Educator, Events, Health Supporter, Quality of Life, Walks, EPP, Health Trainer, Macmillan, and Support Plus. To the right of this section is a 'Service Activity Level' box containing two radio buttons: 'Ongoing Programme' and 'No Activity'. Below these sections is a 'Service Information' tab bar with several tabs: CDE, EPP, Events (which is highlighted with a red box), Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Under the 'Events' tab, there is a table with columns for 'Start Date (dd/mm/yyyy)', 'End Date (dd/mm/yyyy)', 'Attendees Figures', and 'Comments'. The 'Start Date' and 'End Date' columns each have a small calendar icon. At the bottom of the screen, there are status bars for 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (Stuartb). At the very bottom is a pink footer bar with 'New Record' and 'Delete Record' buttons, and the 'health exchange' logo.

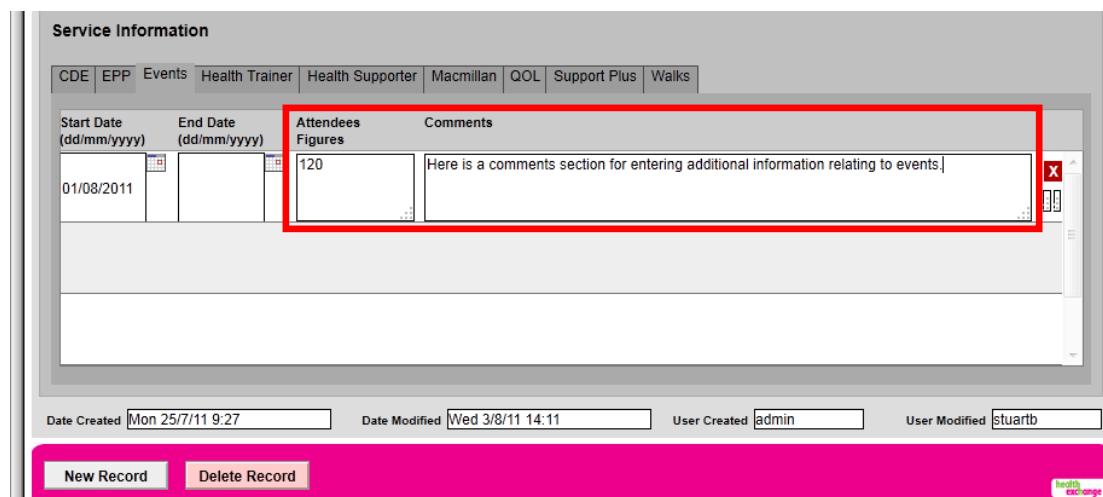
One can input the *Start Date* and *End Date* information by left clicking on the calendar button highlighted below and then selecting the correct date.



This screenshot is identical to the one above, showing the 'Events' service tab selected. The red box in the previous screenshot highlights the calendar icon in the 'Start Date' field of the table. The rest of the interface, including the service selection bar, status bars, and footer, is the same.

## Relationship Tracker User Manual: V1.1

Information can be entered into the *Attendance Figures* and *Comments* fields in the same manner as discussed in previous chapters.



The screenshot shows the 'Events' tab of the Relationship Tracker. At the top, there is a navigation bar with tabs: CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below the navigation bar, there is a table with columns: Start Date (dd/mm/yyyy), End Date (dd/mm/yyyy), Attendees Figures, and Comments. The 'Attendees Figures' column contains the value '120', and the 'Comments' column contains the text 'Here is a comments section for entering additional information relating to events.' A red box highlights this row. At the bottom of the page, there are buttons for 'New Record' and 'Delete Record', and a status bar showing Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb).

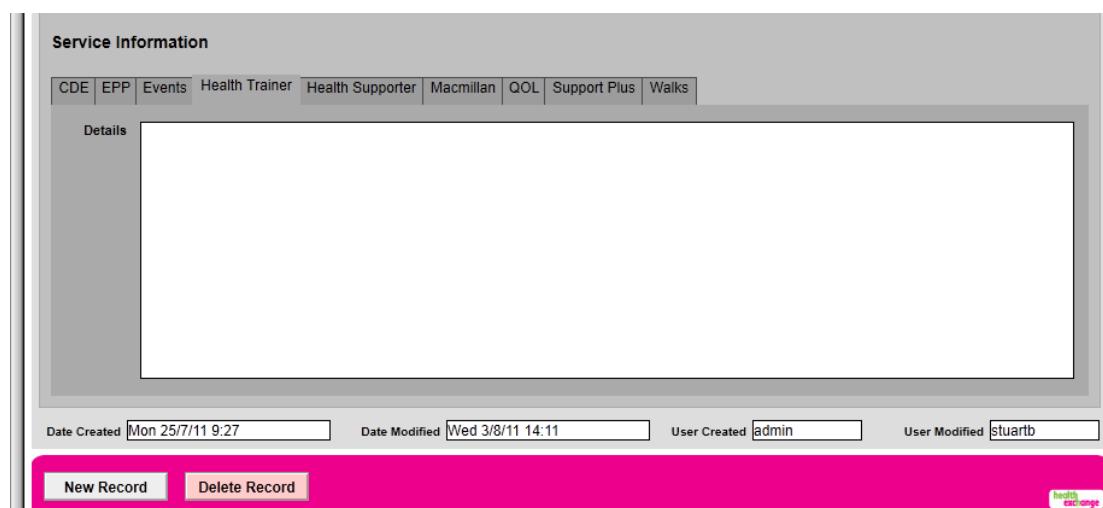
After filling in all relevant fields, one can save the information by left clicking the *Confirm* button at the top of the page.



The screenshot shows a record for 'ABC Community Group' in the Relationship Tracker. The top navigation bar shows 'Logged on as: stuartb' and the 'Relationship Tracker' logo. Below the navigation bar, there are dropdown menus for 'Select Category' and 'Select Organisation', both currently set to 'ABC Community Group'. At the bottom of the page, there are buttons for 'Main Menu', 'Cancel', 'Confirm' (which is highlighted with a red box), 'Reset', 'Query', 'Search', and navigation links for 'Record: 1 of 1 found', '< Previous', and 'Next >'. The status bar at the bottom shows Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb).

### 8.1.4 Entering Data for all Other Services

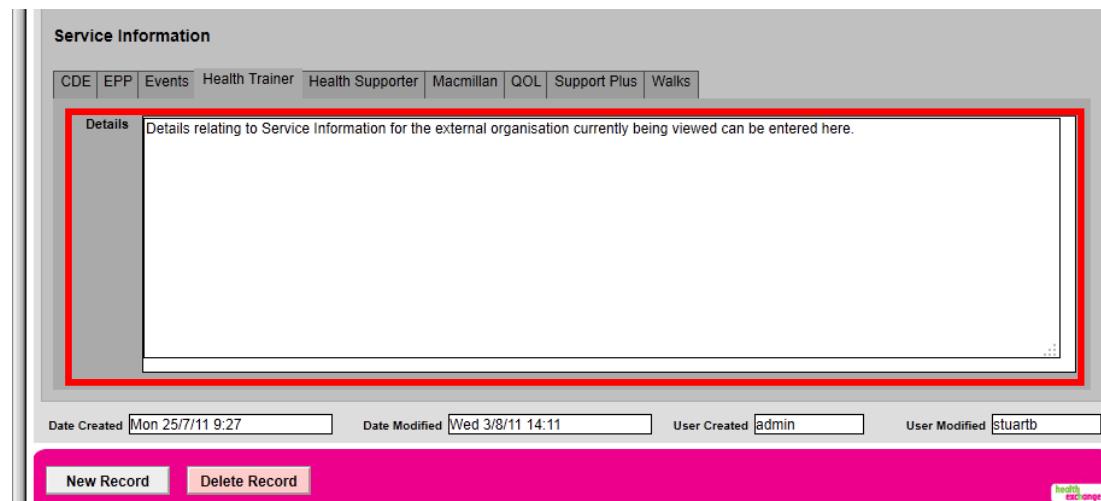
*Health Trainer*, *Health Supporter*, *Macmillan*, *QOL*, *Support Plus*, and *Walks* tabs have a very simple *Details* field in which users can record important information related to the service.



The screenshot shows the 'Health Trainer' tab of the Relationship Tracker. At the top, there is a navigation bar with tabs: CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below the navigation bar, there is a large text area labeled 'Details' which is currently empty. At the bottom of the page, there are buttons for 'New Record' and 'Delete Record', and a status bar showing Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb).

## Relationship Tracker User Manual: V1.1

To enter information into these fields, users can left click within the *Details* field and start typing.

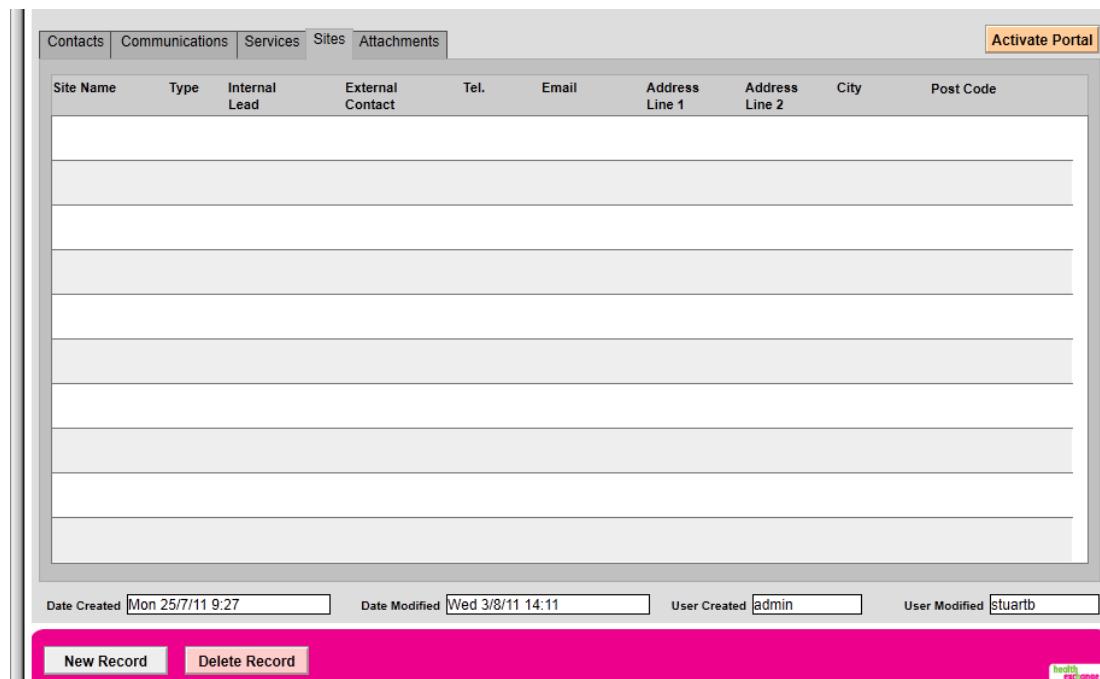


The screenshot shows a web-based application interface for managing service information. At the top, there is a navigation bar with several tabs: CDE, EPP, Events, Health Trainer, Health Supporter, Macmillan, QOL, Support Plus, and Walks. Below the navigation bar, there is a large text input field with a red border, labeled 'Details'. The placeholder text in the field reads: 'Details relating to Service Information for the external organisation currently being viewed can be entered here.' At the bottom of the page, there is a footer section containing four input fields: 'Date Created' (Mon 25/7/11 9:27), 'Date Modified' (Wed 3/8/11 14:11), 'User Created' (admin), and 'User Modified' (Stuartb). Below these fields are two buttons: 'New Record' and 'Delete Record'. A small 'Health Exchange' logo is visible in the bottom right corner of the footer area.

Once again, users must save the information by left clicking the *Confirm* button at the top of the page.

## 8.2 Sites

The Sites tab is an area for inputting additional address locations and contact information for external organisations<sup>13</sup>.



Site Name	Type	Internal Lead	External Contact	Tel.	Email	Address Line 1	Address Line 2	City	Post Code

Date Created: Mon 25/7/11 9:27    Date Modified: Wed 3/8/11 14:11    User Created: admin    User Modified: stuartb

New Record    Delete Record    health exchange

Below are brief descriptions of the fields found within the *Sites* area:

**Site Name**

The name or title of the external organisation's site

**Type**

This field is a drop-down menu with two options<sup>14</sup>; *HQ* or *2<sup>nd</sup>*. *HQ* is for listing the site as a headquarter building, whilst *2<sup>nd</sup>* denotes a satellite or secondary building.

**Internal Lead**

The Internal Lead field is a drop-down menu list of Health Exchange staff members. A staff member can be chosen to display who internally within Health Exchange owns or manages the relationship with that particular site.

**External Contact**

A contact name of an employee who works at the external organisation's site can be added here.

**Tel. (Telephone), Email, Address Line 1, Address Line 2, City, Post Code**

These are self explanatory fields used for entering contact and address information.

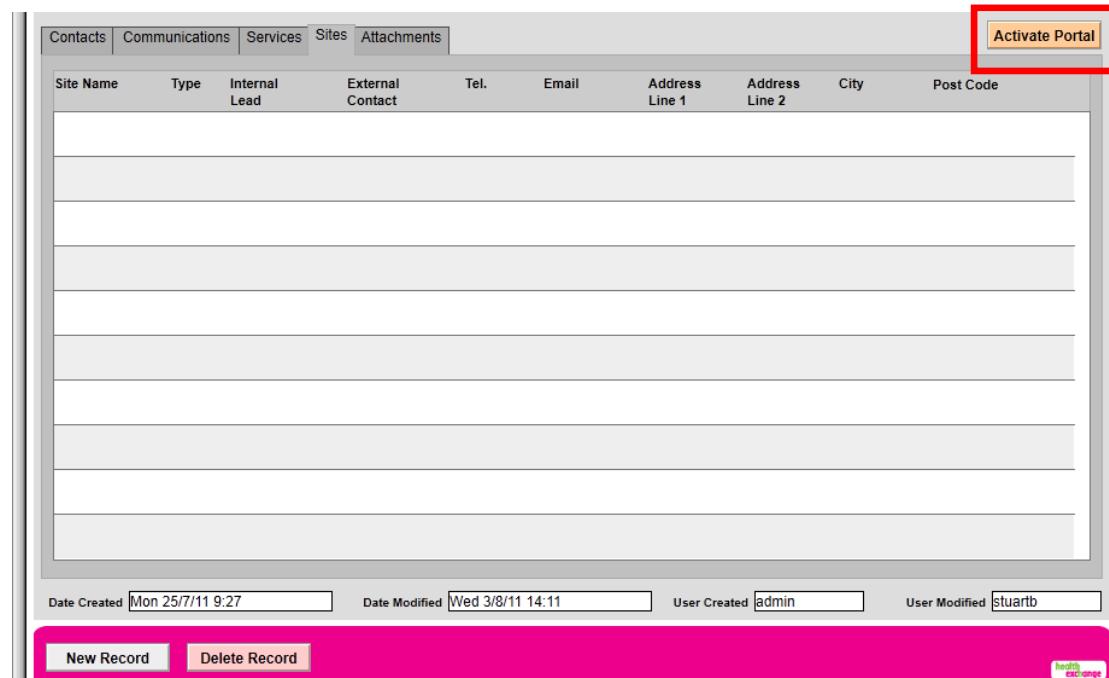
<sup>13</sup> This section is only necessary if the external organisation in question has more than one site or building.

<sup>14</sup> Users can also choose to leave this drop-down menu field blank.

## Relationship Tracker User Manual: V1.1

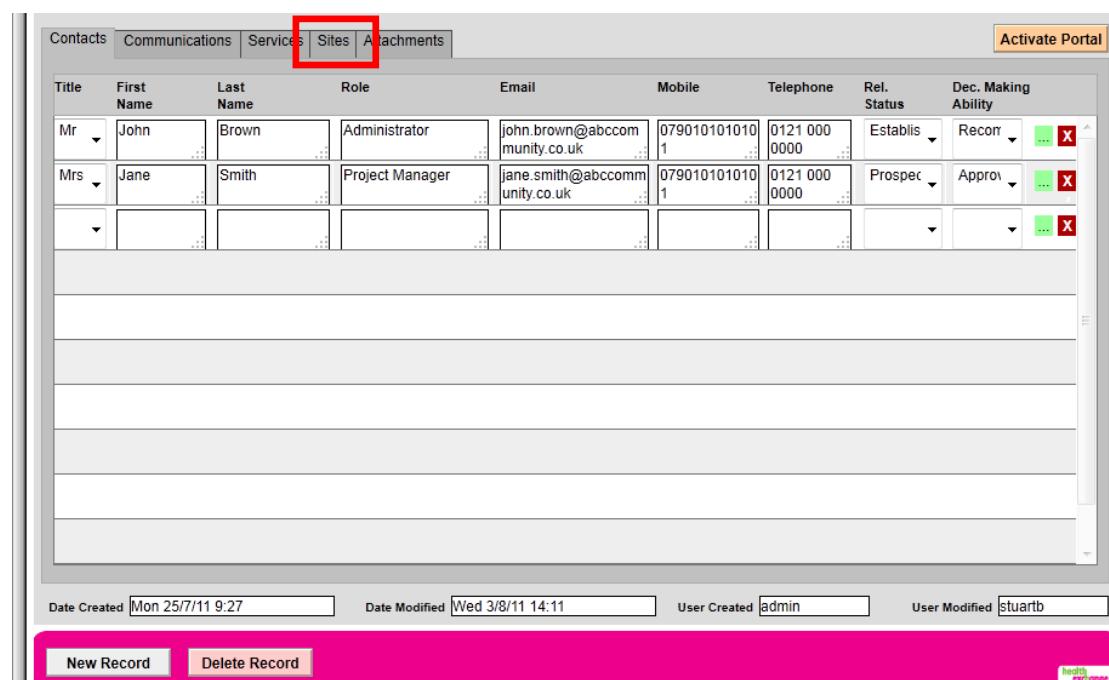
### 8.2.1 Creating a New Site

To create a new site for an external organisation, one must first left click on the *Portal Activation* button.



The screenshot shows a web-based application for managing sites. At the top, there is a navigation bar with tabs: Contacts, Communications, Services, **Sites**, and Attachments. The 'Sites' tab is highlighted. Below the navigation bar is a form with the following fields: Site Name, Type, Internal Lead, External Contact, Tel., Email, Address Line 1, Address Line 2, City, and Post Code. There are several empty text input fields for these fields. At the bottom of the form, there are buttons for 'New Record' and 'Delete Record'. Below the form, there are status fields: Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb). A 'Activate Portal' button is located in the top right corner of the form area, and it is highlighted with a red box. A 'health exchange' logo is in the bottom right corner of the page.

Users must now left click on the *Sites* tab highlighted below.



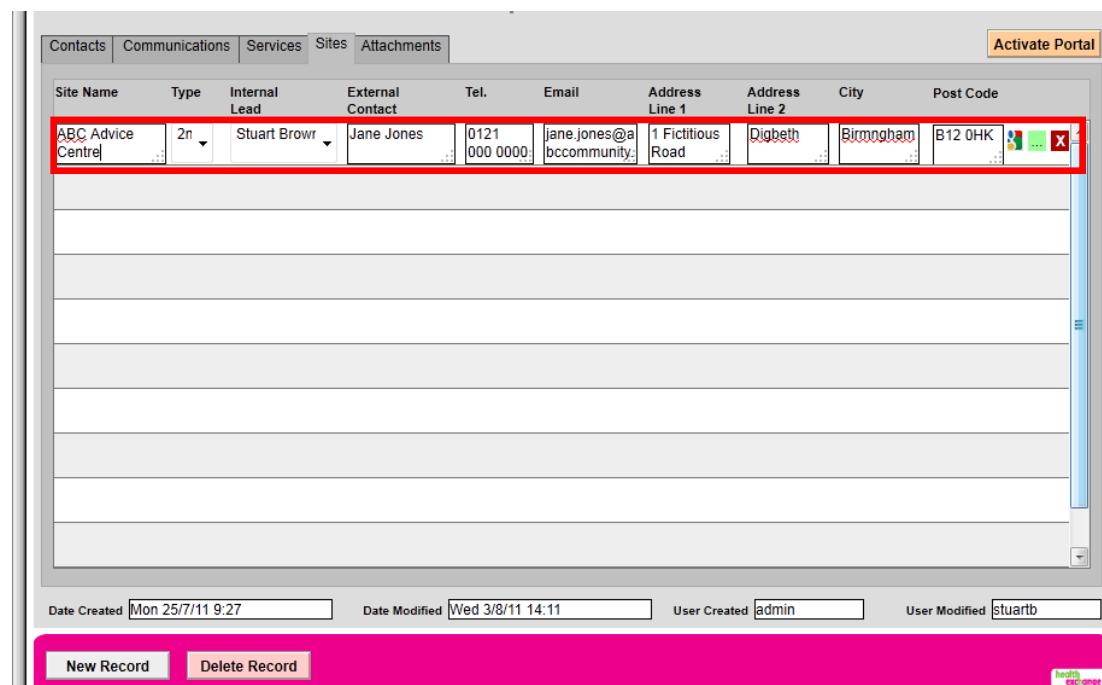
The screenshot shows a list of site records in a grid format. The 'Sites' tab is highlighted with a red box in the navigation bar. The grid has columns for Title, First Name, Last Name, Role, Email, Mobile, Telephone, Rel. Status, and Dec. Making Ability. The first two rows of data are as follows:

Title	First Name	Last Name	Role	Email	Mobile	Telephone	Rel. Status	Dec. Making Ability
Mr	John	Brown	Administrator	john.brown@abccommunity.co.uk	0790101010101	0121 000 0000	Established	Recommending
Mrs	Jane	Smith	Project Manager	jane.smith@abccommunity.co.uk	0790101010101	0121 000 0000	Promising	Approved

Below the grid, there are status fields: Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (stuartb). At the bottom, there are buttons for 'New Record' and 'Delete Record'. A 'health exchange' logo is in the bottom right corner.

## Relationship Tracker User Manual: V1.1

As seen within previous chapters, entering the relevant information within the newly created row is now required.



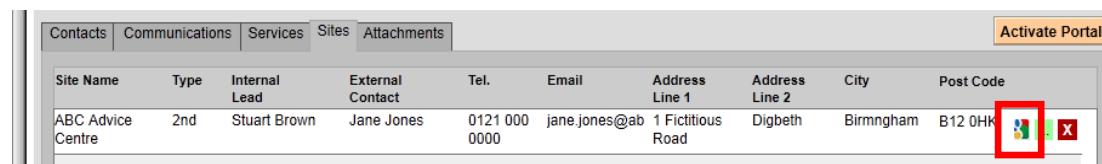
The screenshot shows the 'Sites' tab of the Relationship Tracker. A new record for 'ABC Advice Centre' has been created and is highlighted with a red box. The record includes the following data:

Site Name	Type	Internal Lead	External Contact	Tel.	Email	Address Line 1	Address Line 2	City	Post Code
ABC Advice Centre	2nd	Stuart Brown	Jane Jones	0121 000 0000	jane.jones@abccommunity.co.uk	1 Fictitious Road	Digbeth	Birmingham	B12 0HK

Below the table, there are status boxes for Date Created (Mon 25/7/11 9:27), Date Modified (Wed 3/8/11 14:11), User Created (admin), and User Modified (Stuartb). At the bottom, there are 'New Record' and 'Delete Record' buttons, and a 'health exchange' logo.

Left clicking on the *Confirm* button at the top of the page will then save the newly created site.

Users may notice a new button within the portal row on the right hand side of the page (*highlighted below*). Left clicking this button will launch a new web browser window tab<sup>15</sup> and display the site location, based on the inputted post code, within Google Maps.

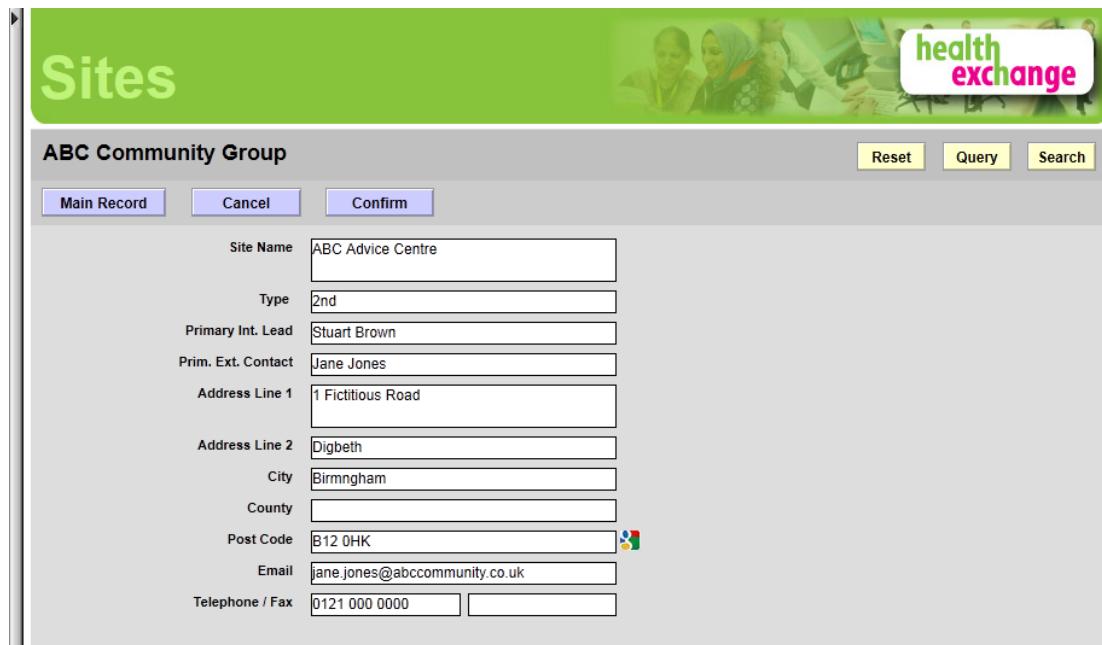


The screenshot shows the 'Sites' tab of the Relationship Tracker. The same site record for 'ABC Advice Centre' is displayed. The 'Google Maps' button, located in the portal row on the right side of the table, is highlighted with a red box.

<sup>15</sup> Staff members may first need to enable pop-ups to ensure this feature launches.

### **8.2.2 Sites in-depth View**

As seen in previous chapters, pressing the green button on the row will present the site information within the in-depth view.



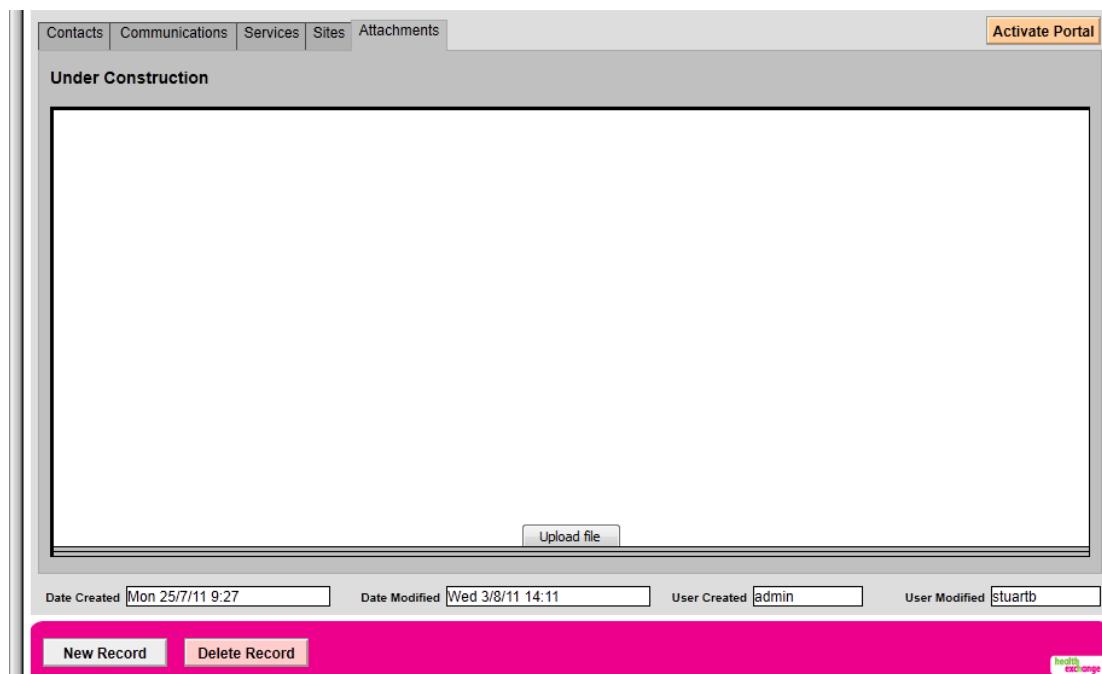
The screenshot shows a software interface for managing sites. The title bar is green with the word 'Sites' in white. In the top right corner, there is a logo for 'health exchange' featuring a green and white design with two people. The main window has a light gray header bar with the text 'ABC Community Group' on the left and three buttons on the right: 'Reset', 'Query', and 'Search'. Below this is a table with the following data:

Site Name	ABC Advice Centre
Type	2nd
Primary Int. Lead	Stuart Brown
Prim. Ext. Contact	Jane Jones
Address Line 1	1 Fictitious Road
Address Line 2	Digbeth
City	Birmingham
County	
Post Code	B12 0HK
Email	jane.jones@abccommunity.co.uk
Telephone / Fax	0121 000 0000

Left clicking the *Main Menu* button will bring the user back to the main page.

### **8.3 Attachments**

The attachments section is currently under construction and inaccessible to all users. When completed, the attachments area will allow users to save and access files relating to the selected external organisation.



## **Glossary of Terms**

### **Activity Icons**

Activity icons are small buttons primarily situated on the main record page. The icons are used to take the user to additional information related to the external organisation record which is found via the Internet. Wikipedia, Google Maps, and Twitter web pages are three examples of activity icons.

### **Buttons**

Buttons are used to perform certain tasks within the Relationship Tracker. Buttons include *Next* and *Previous* functions which allow the user to move up and down the record list.

### **Checkbox Set List**

Checkbox set lists are fields which allow the user to tick or leave blank. A ticked checkbox may indicate a certain selection. For example, ticking the *Funder* checkbox set within the *Relationship Type* field would suggest that the organisation provides funding to Health Exchange.

### **Drop-down Menu**

A drop-down menu is an area which allows users to select values or categories from a prescribed non-modifiable list.

### **Fields**

Fields are text areas within the database which store and display information. Some are accessible to users, allowing them to enter and save information, whereas others are locked.

### **Footer**

The footer is the final section of all Relationship Tracker layouts. On the main record page, the footer holds non-modifiable time and user record creation fields, as well as buttons used to create and delete records.

### **Header Section**

The header is positioned at the top of all Relationship Tracker layouts and where the majority of user controls are situated. Titles describing the page's contents are also stored here.

### **In-depth View**

In-depth views are page layouts which allow users to access additional fields from the tabbed portal. Fields within in-depth views provide bigger spaces in which to type and read information within.

### **Label**

Labels are titles used to describe what information is and should be stored within the field it is nearest to.

## **Relationship Tracker User Manual: V1.1**

### **Layout**

Layouts are visual page designs within the Relationship Tracker, constructed of header, main body, and foot sections.

### **Main Body**

The main body is a section of the Relationship Tracker's main record page. Within this section are address and contact fields, as well as tabbed portals.

### **Radio Button**

Each field within the Relationship Tracker has been issued with a label. This is to help the user understand what the field is used for and what type of information should be entered.

### **Record Selection Text**

The Record Selection Text field is positioned within the header section of the main organisation record page and informs users of what record they are currently viewing in relation to the total number of records. It is particularly useful when searching for or filtering records, informing the user of how many records are available.

### **Tabbed portal**

The tabbed portal is used to display additional information in a table row format related to the main record.